



Adansonia Global Opportunities Portfolio

Focussed on delivering risk adjusted returns and reducing investors correlation risk.

Investment Profile

The portfolio aims to provide long term capital growth, it is highly concentrated (typically 10- 30) and directly invested in international securities offered on recognised stock exchanges. The portfolio has a strong leaning towards excellent blue chip companies with strong and enduring businesses, high profitability and consistent growth. The strategy holds up to 12.5% in any one position.

Harbourside Portfolios aim to provide better investor outcomes by providing:

- **Strong Risk Adjusted Returns:** Measures investment returns after taking into consideration the degree of risk that was taken to achieve it.
- **Reduced Correlation Risk:** By investing in a diversified portfolio of negatively correlated assets to smooth overall return profiles.
- **A range of bespoke investment solutions:** which can be tailored to meeting individual investment needs.

Investment Summary

A high conviction, directly invested portfolio of globally listed securities offered on recognised stock exchanges

Risk - High

Benchmark -To outperform the MSCI World total Return Index (in AUD) over a 7-year plus investment

Recommended investment period - min 7 years

Suggested Minimum Investment: A\$50, 000

Key Benefits

The benefits of investing are:

- **Focused on risk adjusted returns** - The goal of risk adjusted returns is to achieve the best possible return from the underlying asset classes with the least amount of risk.
- **Transparency** - Direct ownership of the underlying assets.
- **Professionally managed** - An investment committee actively manage the asset allocation within each portfolio.
- **Tax effective** - Managed accounts don't generally expose investors to the same level of inherent tax consequences as traditional pooled, multi-asset investments

For more Information

[Click here to view the Adansonia Global Opportunities Portfolio Factsheet](#)



THIS DOCUMENT CONTAINS GENERAL INFORMATION ONLY AND DOES NOT TAKE INTO ACCOUNT INDIVIDUAL FINANCIAL CIRCUMSTANCES. INVESTORS SHOULD CONSIDER THE INFORMATION MEMORANDUM AND SEEK INDEPENDENT ADVICE TO DECIDE IF THE STRATEGY IS APPROPRIATE TO THEIR CIRCUMSTANCES. HARBOURSIDE INVESTMENT MANAGEMENT IS A CORPORATE AUTHORISED REPRESENTATIVE OF SHARTRU WEALTH MANAGEMENT WHICH HOLDS AN AUSTRALIAN FINANCIAL SERVICES LICENCE (AFSL 422409). THIS MATERIAL IS GENERAL IN NATURE AND SHOULD NOT BE CONSIDERED BY THE RECIPIENT AS A RECOMMENDATION RELATING TO THE ACQUISITION OR DISPOSAL OF INVESTMENTS. THIS MATERIAL DOES NOT CONTAIN SUFFICIENT INFORMATION TO SUPPORT AN INVESTMENT DECISION AND INVESTORS SHOULD ENSURE THAT THEY OBTAIN ALL AVAILABLE RELEVANT INFORMATION, INCLUDING THE INVESTMENT MEMORANDUM, BEFORE MAKING AN INVESTMENT. ANY ADVICE PROVIDED PREVIOUS TO A STATEMENT OF ADVICE (SOA) IS GENERAL ADVICE ONLY AND IS BASED SOLELY ON CONSIDERATION OF THE INVESTMENT OR TRADING MERITS OF THE FINANCIAL PRODUCTS ALONE, WITHOUT TAKING INTO ACCOUNT THE INVESTMENT OBJECTIVES, FINANCIAL SITUATION AND PARTICULAR NEEDS (I.E. FINANCIAL CIRCUMSTANCES) OF ANY PARTICULAR PERSON. THE FINANCIAL SERVICES GUIDE SHOULD BE CONSIDERED BEFORE DECIDING TO DEAL WITH HARBOURSIDE INVESTMENT MANAGEMENT. BEFORE ACTING ON ANY INFORMATION ON THIS WEBSITE, YOU SHOULD CONSIDER THE APPROPRIATENESS OF IT (AND ANY RELEVANT PRODUCT) HAVING REGARD TO YOUR CIRCUMSTANCES AND YOU SHOULD CAREFULLY READ AND REVIEW THE PDS OF THE RELEVANT FINANCIAL PRODUCT AS PROVIDED BEFORE ACQUIRING THE PRODUCT.