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

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