

# BUILDING RESILIENT & TAILORED PORTFOLIOS

**MDA**

**HARBOURSIDE**  
INVESTMENT MANAGEMENT

A managed portfolio solution built around real client outcomes.

This information is general advice for investors and does not take account of investors' objectives, financial situation or needs.

# BEYOND THE BENCHMARK: FOCUSED ON REAL OUTCOMES

**Our MDA is designed for advisers who want more than a generic market tracking solution.**

It provides a practical framework for building portfolios around what clients actually care about: capital preservation, income, preserving purchasing power and the ability to stay invested through changing market conditions.

Rather than relying on broad passive exposure alone, the approach focuses on risk adjusted portfolio construction using assets and strategies that behave differently across market cycles.



# PRACTICAL DOWNSIDE PROTECTION

**A flexible and risk aware managed portfolio solution designed to help advisers deliver more personalised and outcome focused recommendations.**

The structure is well suited to advisers who want a professionally managed investment solution that still allows meaningful tailoring around client circumstances.

It supports better advice conversations by linking portfolio design to risk tolerance, liquidity requirements and long term objectives. For clients, the message is straightforward: a portfolio designed to pursue your objectives while reducing reliance on a single market outcome.



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# A FRAMEWORK FOR BETTER ADVICE



## Key reasons advisers are using the MDA:

### 01 Tailored Portfolio Construction

Portfolios can be shaped around the client's risk profile, liquidity needs and preference for income, growth or defensiveness.

### 02 Broader Implementation Flexibility

Advisers can combine diversified portfolios with sector, strategy and tailored exposures rather than relying on a one-size-fits-all outcome.

### 03 Focus on Downside Awareness

The investment philosophy emphasises diversification across non correlated assets that behave differently in stressed markets, not just owning more equities.

### 04 Alignment with Client Outcomes

A low base fee with performance linked remuneration supports an advice proposition centred on accountability and active management.

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# PROFESSIONAL PORTFOLIO MANAGEMENT

**Stability. Growth. Diversification.**

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**Choose the building blocks that make up your client's portfolio:**

- Diversified portfolios
- Australian equities
- International equities
- Income and growth strategies
- Listed and unlisted property
- Infrastructure
- Fixed interest
- Strategic fixed interest
- Alternatives and tailored holdings

**Our team is ready to speak to you about your clients' needs. Get in touch to discuss how we can support your advice process.**



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