

Ibbotson Multi-Manager Portfolios

Key Benefits

- ▶ Outsource asset allocation, manager selection, and portfolio construction to experts
- ▶ Free up time to focus on client needs
- ▶ Automatic rebalancing reduces transaction costs
- ▶ Choose solutions for different client profiles from a convenient single product suite

Add Value to Your Business

Using multi-manager portfolios to implement your clients' investment strategies can save you time and money, allowing you to focus on other important activities that support the development and growth of your business.

The Ibbotson multi-manager portfolios give you access to investment strategies and managers researched and selected by a dedicated team of investment specialists. Ibbotson, a Morningstar company, assesses numerous investment products and strategies annually.

The depth and breadth of research in our multi-manager portfolios means you can confidently outsource the complex tasks of asset allocation, manager selection, and portfolio construction.

Let Someone Else Do the Hard Work

Ibbotson's multi-manager portfolios take the hard work out of running a portfolio. The ongoing research, monitoring and decision-making regarding portfolio profiles can not only be difficult, but also time-consuming. Keeping on top of world events and the economic environment in order to adjust portfolios can distract you from other, equally important tasks. Ibbotson monitors the investment managers and their roles in the portfolios, freeing you to work more closely with your clients and add value.

Using daily cashflows, the portfolios are automatically rebalanced to ensure they are in line with their stated targets and investment objectives. This not only saves you time, but also avoids unnecessary transaction costs.

Diversified multi-manager portfolios are designed to meet a range of investment outcomes. Ibbotson assembles a team of investment managers who are experts in their field and complement each other to provide comprehensive coverage across investment sectors.

The wide range of portfolios available means there is a multi-manager portfolio designed to suit the investment profile of different clients. You can reduce the time spent running individual portfolios by segmenting your clients by risk profile and desired investment outcomes, then choosing the multi-manager solution appropriate for their needs and applying it to them as a group.

Boost Client Confidence

Managing client expectations is easier when they understand their portfolios.

Utilising a multi-manager portfolio allows you to talk with confidence to your clients about their investments. Ibbotson provides a range of communication tools such as market and manager overviews, research papers, and performance reports, enabling you to sit down with your clients and discuss their portfolios in a meaningful manner.

Consolidated reporting also reduces the administration burden, giving you additional time to focus on your clients' needs.

More Information

For further information please contact our Investment Services Team in Sydney on +61 2 9276 4550 or email client.enquiries@ibbotson.com