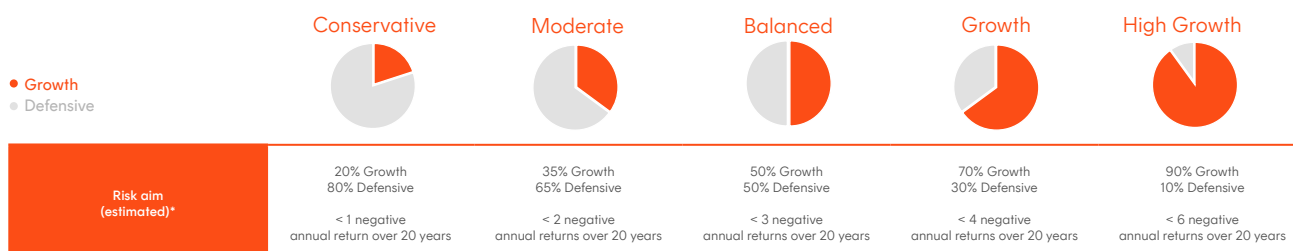


## Overview

Betashares Dynamic Managed Accounts seek to achieve capital growth and income streams through careful blending of major asset classes, including Australian equities, international equities, listed property, bonds, cash and commodities.

The portfolios are constructed using a range of exchange traded funds and employ dynamic 'asset class tilting' that seek to provide enhanced risk-adjusted returns over time. This results in institutional-quality portfolios that are cost-effective, diversified, transparent and simple to explain to clients.

The models are optimised to five risk profiles based on the APRA/FSC/ASFA Standard Risk Measure



\*This is not a complete assessment of all applicable forms of investment risk. Investors should still ensure they are comfortable with risks and potential losses associated with their chosen investment option.

The portfolios are rebalanced quarterly, providing the flexibility to make adjustments to asset allocation positions based upon Betashares' modelling of asset class mis-valuations, risk objectives and economic considerations.

## Key features

### Focused asset class selection

The portfolios focus on getting the big decisions right across the major asset classes, with the aim of reducing complexity and delivering more predictable outcomes for your clients.

### Dynamic asset allocation

The portfolios are rebalanced quarterly, providing the flexibility to make adjustments to asset allocation with the goal of providing enhanced risk-adjusted returns over time.

### Best-of-breed ETF selection

ETF selection is based on merit, with ETFs from both Betashares and other leading ETF managers used to ensure portfolios are constructed in the most cost-effective and appropriate way.

### Mix of market-cap and smart beta methodologies

Betashares Dynamic Managed Accounts utilise both traditional low-cost market cap-weighted ETFs, and smart beta methodologies that have a demonstrable rationale and seek to outperform market-cap weighted approaches, typically at a lower fee level than active managers.

## Benefits of using Betashares Managed Accounts in your practice

### Lower portfolio costs

Betashares Managed Accounts can increase efficiency in your practice, and reduce costs in client portfolios. Total portfolio fees are typically lower than the costs of traditional portfolios and active model managers.

### Comprehensive service

Our high-quality reporting delivers transparency for clients and lightens your administrative load. Reporting and expert resources include:

- Monthly factsheets and detailed quarterly reports
- Client-friendly quarterly emails
- Personalised service from our dedicated nationwide Adviser Services team
- Access to Betashares' Portfolio Management team, investment specialists and Chief Economist.

Eligible advisers utilising Betashares Managed Accounts in their practice also have access to our Business Acceleration Services.<sup>1</sup> Betashares Business Acceleration Services provides advisers with a range of useful tools and resources to help you to run a more efficient practice, grow your business and deliver better client outcomes.

<sup>1</sup> Contact your Betashares Account Manager to discuss your eligibility for Business Acceleration Services.

## Platform availability

Betashares Dynamic Managed Accounts are available on the following platforms:



	Praemium	Macquarie	HUB24	HUB24 Discover	BT Panorama	Netwealth	CFS First Choice	CFS Edge	AMP North
Betashares Dynamic Conservative Portfolio	BB0101	SMABET02S	BTA001		BET001CON	MACC000211	CFSBETDETFC	EDGBETDETFC	NTH0201
Betashares Dynamic Moderate Portfolio	BB0102	SMABET05S	BTA002	BTA040	BET002MOD	MACC000212	CFSBETDETFM	EDGBETDETFM	NTH0202
Betashares Dynamic Balanced Portfolio	BB0103	SMABET01S	BTA003	BTA041	BET003BAL	MACC000213	CFSBETDETFB	EDGBETDETFB	NTH0203
Betashares Dynamic Growth Portfolio	BB0104	SMABET03S	BTA004	BTA042	BET004GRW	MACC000214	CFSBETDETFG	EDGBETDETFG	NTH0204
Betashares Dynamic High Growth Portfolio	BB0105	SMABET04S	BTA005	BTA043	BET005HGR	MACC000215	CFSBETDETFHG	EDGBETDETFHG	NTH0205

Betashares Dynamic Managed Accounts are also available on Mason Stevens, OneVue and HarbourWrap and can be accessed using the investment names above.

## Betashares Adviser Support

As an Australian founded and managed firm, all decisions relating to the model portfolio service reside with the local business, and Betashares is able to leverage the full resources of its local team to provide support to Advisers.

Examples of support:



SMA product profiles



Client-friendly quarterly email



Monthly factsheets



Access to Betashares senior personnel, including Betashares' Chief Economist and client events



Detailed quarterly reports



Videos & webinars



Personalised service for your advice practice (if implemented via an SMA)

## Contact us

To find out how the Betashares Managed Account range can support your practice, contact our Adviser Services team on 1300 487 577 or your local Betashares account manager.

### Betashares Adviser Services

1300 487 577 (within Australia)

+61 2 9290 6888 (outside Australia)

info@betashares.com.au

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