



Media Release

MLC Asset Management bolsters Managed Accounts offering

- MLC Asset Management expands its range of Managed Accounts Strategies with conservative and high growth options in response to market demand
- The portfolios use a forward-looking scenarios approach, building resilience
- MLC Asset Management's Managed Accounts Strategies reaches \$500 million milestone in two years

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MLC Asset Management (MLC¹), has expanded its range of Managed Account Strategies to include conservative and high growth options in response to market demand from advisers for more transparent, diversified solutions for clients.

MLC Asset Management is one of Australia's most experienced investment managers with over \$170 billion assets under management and more than 100 investment professionals across ten teams². MLC's Managed Account Strategies combine MLC's proven investment expertise with the benefits and efficiencies of a managed account structure and have been given an Outstanding rating by independent research firm SQM Research³, the only manager to receive this rating for multi asset managed accounts nationally.

The Premium Model Portfolios capture the return opportunities of active management, and the Value Model Portfolios manage costs through select passive exposures, providing clients with real choice.

MLC General Manager Direct Capabilities and Specialist Investment Services, Jason Komadina, says MLC Asset Management has a long and deep history of helping advisers and their clients achieve their goals.

"The need for quality advice and demands on advisers have both never been higher. We are very pleased to bring these new portfolios to market given the success we've had with our existing portfolios. Now the range includes conservative and high growth options offering a full suite for advisers to utilise, we have taken the opportunity to align the existing portfolios naming convention with industry standards, while also more simply and transparently conveying the nature of their expected risk," he said.

Additionally, MLC's Managed Accounts Strategies have reached its \$500 million milestone in under two years.

Commenting on this milestone, Mr Komadina said, "Reaching this milestone in just two years is a testament to our expert team. We have a strong heritage of managing multi-asset diversified portfolios to deliver quality outcomes for clients at a competitive price point."

Managed accounts still a booming market

Australians now have over \$130 billion⁴ invested in managed accounts as investors and their advisers continue to be attracted to the simplicity of accessing professionally managed portfolios while providing them transparency and direct ownership of the underlying investments.

¹ References to MLC mean MLC Asset Management which includes MLC Asset Management Services Limited (MSL), investment manager of MLC Managed Account Strategies and MLC Asset Management Pty Limited (MLCAM), distributor of MLC Managed Account Strategies.

² As at 31 December, 2021

³ <https://www.mlc.com.au/our-investment-managers/mlc-managed-account-strategies/overview>

⁴ As at 31 December 2021, Institute of Managed Account Professionals (IMAP), <https://www.imap.asn.au/component/content/article/110-perspectives/perspectives-summer-2022/1058-imap-fumcensus-dec-2021?Itemid=101>

Commenting on the managed accounts industry, MLC Portfolio Manager, Anthony Golowenko, said:
“Managed accounts continue to grow in popularity (in Australia) as they offer simplicity and scalability with the ownership, and transparency of direct investing. They allow advisers to provide efficient and effective solutions to a wider client base, offering clients an attractive means of gaining exposure to a range of investments.

“We build resilient portfolios using a forward-looking scenarios approach. This focuses on the distribution of capital market returns, rather than point estimates, making them better positioned to deal with future markets uncertainties,” he noted.

Both Premium Model and Value Model Portfolios are now available via the MLC Wrap, MLC Navigator, Macquarie Wrap, BT Panorama, and HUB24 platforms.

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Note to editors

The table below provides an overview of the expanded portfolios & name changes:

Current Names	New Portfolios & Name Changes
	MLC Premium Conservative 30
MLC Premium Moderate	MLC Premium Moderate 50
MLC Premium Assertive	MLC Premium Balanced 70
MLC Premium Aggressive	MLC Premium Growth 85
	MLC Premium High Growth 98
	MLC Value Conservative 30
MLC Value Moderate	MLC Value Moderate 50
MLC Value Assertive	MLC Value Balanced 70
MLC Value Aggressive	MLC Value Growth 85
	MLC Value High Growth 98

Important Information

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MLC Managed Account Strategies are available via investment platforms. Please refer to the MLC Asset Management website (www.mlc.com.au) for a full list of platform availability. You should obtain a Product Disclosure Statement relating to the investment platform and consider it before making any decision about whether to acquire or continue to hold interests in the Model Portfolios. MLCAM may use the services of any member of the Insignia Financial Group of companies where it makes good business sense to do so and will benefit customers. Amounts paid for these services are always negotiated on an arm's length basis.

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