

**Lonsec**



# Lonsec Research

Investment product research  
and insights to empower your  
financial advice



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Lonsec is one of Australia's leading investment research houses, providing financial product ratings, market insights and portfolio construction tools to empower financial advisers, dealer groups and fund managers.

Our mission is to help you leverage your knowledge and expertise, and to equip you with the tools and insights you need to deliver high quality, tailored financial advice solutions to your clients. From investment research and consulting services to iRate, our market leading investment research platform, we have a broad offering to suit your needs.

# How we can help you

Lonsec's research enables you to efficiently build a complete picture of your client's investment portfolio, to aid understanding and facilitate more informed and insightful conversations.

iRate provides access to an unparalleled breadth and depth of qualitative research, including managed fund, listed product, super fund and super fund investment option research, accessible through a single portal.

## Managed funds research

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Filter your investment product universe and receive market leading research and investment insights.

- + Fund Reviews, ratings and announcements and daily commentary
- + Export quantitative data on 10,000+ funds
- + Access manager selection expertise across a range of risk profiles

## Direct equities research

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Access stock research and ratings from Lonsec's direct equities team.

- + Research covering all ASX 200 shares and listed securities
- + Corporate action and IPO research
- + Shares identified as growth or income generating
- + Specialist research and analysis of ASX listed income securities (hybrids)
- + Coverage of ETF's, LIC's, LIT's, SMA's and mFunds

## Super fund research

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Compare superannuation funds across a range of qualitative factors using research from our SuperRatings team.

- + Research covering 600 superannuation products across over 300 fund characteristics
- + Fund Snapshots available for 6,000 + investment options covering MySuper, Member Choice and Pension
- + Comparison tool to effectively compare products on key metrics

## Portfolio construction tools

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Clearly demonstrate the value of your financial advice using iRate's cutting edge portfolio modelling capabilities.

- + Construct, model and compare client portfolios
- + Track time-series portfolio changes
- + Compare up to five different portfolios using 16 metrics
- + Generate customisable portfolio and market reports covering any period

# The Lonsec difference



## Experienced research professionals

Seasoned research professionals are able to have deeper conversations with investment managers, to look behind the numbers and provide meaningful investment insights.



## Breadth and depth of research

Our unparalleled depth and breadth of qualitative investment product research allows you to build contemporary investment solutions that are best suited to your client's needs.



## Our market leading research platform

Efficiently build a complete picture of your client's investment portfolio, aid understanding and facilitate more informed and insightful conversations with your clients.



## Bespoke investment consulting service

Take your financial advice and investment solutions to the next level with tailored investment consulting services that leverage our investment research and portfolio construction expertise.



## Timely and actionable insights

Dynamic alerts and watch lists make it easier to stay up to date on the events and trends that have a direct impact on your client's investment portfolio.



## Focus on qualitative factors

Filter your investment universe and construct portfolios aligned with your client's goals and preferences, enabling you to demonstrate how you are meeting your best interests duty.

# Actionable insights with analytical rigour

We understand that identifying future outperformance is an artform, not a science. Our analysts go beyond the pure numbers to understand the people and structures behind each investment product, giving you the tools to select high quality fund managers for individual investment needs.

## High level sector review



## Key inputs

PDS and additional  
manager material

Lonsec corporate &  
FSC questionnaires

Face-to-face  
meetings

Performance data &  
Lonsec's ratings model



## 20% Quantitative Assessment

- Historical performance data
- Risk and return metrics
- Consistency of performance

## 80% Qualitative Assessment

- People and resources
- Investment philosophy (style)
- Research process
- Portfolio construction
- Risk management
- Lonsec financial product review



## Peer Review



## Ratings and report published

# Easily compare funds across a range of factors

Our investment product reviews and ratings represent an objective assessment of a product's ability to meet its stated objectives, easily allowing you to compare products across a wide range of qualitative and quantitative factors.



## Highly Recommend

Lonsec has very strong conviction the financial product can generate risk adjusted returns in line with relevant objectives. The product is considered a preferred entry point to this asset class or strategy.



## Recommended

Lonsec has strong conviction the financial product can generate risk adjusted returns in line with relevant objectives. The product is considered an appropriate entry point to this asset class or strategy.



## Investment Grade

Lonsec has conviction the financial product can generate risk adjusted returns in line with relevant objectives. However, if applicable, Lonsec believes the product has fewer competitive advantages than its peers.



# Demystify your client's super

Produced by SuperRatings®, Lonsec's specialist superannuation product research team, iRate delivers research based on the most extensive superannuation fund benchmarking survey conducted in the Australian market.



Efficiently compare over 600 superannuation products across 300 characteristics covering Investment, Fees, Insurance, Member Servicing, Administration and Governance, that are used to determine a fund's overall rating.



Search the iRate superannuation product universe and access product information, investment performance, fee data, and a wealth of other benchmarking metrics.



Get relevant and useful information to aid your understanding of individual superannuation products and make personal advice recommendations based on your client's best interests.



Generate intuitive, user-friendly reports to facilitate more insightful conversations.



Access a wealth of investment product research through a single platform.

# How you can use our research

## Navigate the product universe

- Access unparalleled depth and breadth of research covering managed fund, listed and superannuation fund products
- Efficiently filter your investment product universe according to a range of qualitative fund characteristics

## Build and manage portfolios

- Use iRate's Portfolio Construction tool to build tailored portfolios for clients
- Analyse and compare financial products across 16 different risk metrics
- Integrate with wealth management software Xplan, COIN, Midwinter and CCUBE

## Stay Informed

- Track the latest product and market developments with daily bulletins
- Discover the key risks and opportunities with investment insights, economic analysis and market data
- Enhance your clients' portfolios with quarterly sector outlooks and dynamic asset allocation weights

## Set product alerts

- Stay up to date with Lonsec's ratings and reviews with dynamic product alerts
- Never miss ratings changes or important information relating to your portfolio
- Add the iRate equities package for updates on corporate actions and ASX 200 shares

## Continue learning

- Develop your skills with online training and webinars
- Get quarterly portfolio updates straight from our CIO
- Attend our industry events and roadshows to get the latest insights from industry thought leaders

## Let us partner with you

- Engage our investment consultants to take your investment advice to the next level
- Leverage our expansive financial product knowledge and research
- Enhance your asset allocation, manager selection and governance structures

We are delighted to be voted Research House of the Year 2018 by in Money Management's Rate the Raters survey of financial advisers. We remain committed to delivering the best research and tools to empower your investment solutions through 2019 and beyond.

Libby Newman  
Executive Director, Lonsec Research



# How we help you help your clients



## Regular market updates

Expert economic and sector specific commentary helps you provide a broader market context to your investment decisions.



## Draw on our analysts

Our investment analysts are accessible and available to help you better understand a particular investment product or rating decision.



## Educational material

Articles, videos and other educational tools for you to share with your clients so they can better understand your investment process.



## Ongoing support

Our experienced client services team are just a phone call away and are here to provide you with ongoing guidance and support.



## Events and webinars

Hear the latest thinking in investment insights from our team at our regular events and webinars.

# The Lonsec Group

## Research

Managed investments and listed securities research delivered via our market leading iRate platform.



Superannuation product research and benchmarking for financial advisers and funds.

## Investment Solutions

Lonsec's managed portfolios and SMA solutions for financial advisers and retirement specialists.

# Want to find out more?

Get in touch today to find out how we can help empower your financial advice.  
Call us on **1300 826 395** or email **[info@lonsec.com.au](mailto:info@lonsec.com.au)**

**[Lonsec.com.au](http://lonsec.com.au)**

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