

# People



## **Hugh MacNally, B.A., ASIA, F Fin, OPM (Harvard) – Executive Chairman**

Hugh MacNally is a Director and the founder of PPM. He has been a full time executive of PPM since 1995 and is responsible for management of portfolios and the analysis of investment opportunities. Prior to founding PPM, Hugh was the Investment Manager at Permanent Trustee Company, where he had responsibility for the management of a large number of portfolios on behalf of estates, individuals and charities, totalling \$900 million. Prior to joining Permanent Trustees, Hugh was an analyst and later investment manager at APA Assurance covering Australian and New Zealand equities. Hugh commenced his career in 1984 and has completed the OPM management course at Harvard Business School.



## **Peter Reed, B.Ec., LLB – Portfolio Manager, Director**

Peter Reed joined PPM in July 2007 to undertake stock research and portfolio management. Peter spent 8 years during the 1990's with Chase Bank in Tokyo managing international equity portfolios. In 2001 Peter relocated back to Australia, where he joined QBE Insurance, managing Australian and New Zealand equity portfolios. Funds under management within the investment division at the time were in excess of \$15 billion. Peter holds a bachelor degree in Economics and Law from the University of Sydney.



## **Ian Hardy, B.Ec., F Fin – Portfolio Manager, Director**

Ian Hardy is a Portfolio Manager responsible for research and investment management of fixed interest and equities. Prior to joining PPM, Ian was Chief Investment Officer at Centric Wealth where he was responsible for \$400 million in funds under management. Before Centric, Ian played a key role in building the Challenger business, where he was Group Chief Investment Officer with responsibility for more than \$8 billion in funds. Ian has over 30 years investment management and research experience.



## **Franklin Djohan, B.Bus., MBA, CPA – Portfolio Manager**

Franklin Djohan joined PPM in 2005, and is responsible for investment research for both domestic and international equities. Prior to joining the investment management team, Franklin was the fund accountant responsible for portfolio accounting and reporting at PPM. Franklin holds a Bachelor of Business in Accounting and Finance, and a Master of Business Administration. He is a member of Certified Practising Accountants (CPA).



## **Neil Sahai, B. Applied Finance, Dip of Project Management – Dealer/Junior Analyst**

Neil Sahai has recently joined PPM in 2018 as a dealer and junior analyst. He is a recent Bachelor of Applied Finance graduate with a strong academic record. He will work closely with the portfolio managers and analyst team. Prior to joining PPM, Neil worked with Ausgrid as a Project Estimator. Neil is currently undertaking the Chartered Financial Analyst qualification.



## **Max Herron-Vellacott, B.Bus. – Analyst**

Max Herron-Vellacott joined PPM in April 2017 as a recent graduate from the Queensland University of Technology where he completed a Bachelor of Business majoring in Finance. Max joined PPM as a member of the investment team as a Junior Analyst. Max is responsible for undertaking investment research and working in an active support role to the investment team in its day-to-day activities. Prior to joining PPM on a full time basis Max completed a summer internship with PPM.



### **Samantha O'Connor, B.Bus., B.Laws, GIA Cert – General Counsel & COO, Director**

Samantha O'Connor joined PPM in 2015 as General Counsel and Chief Operating Officer and is responsible for PPM legal, governance, business planning and strategy. Prior to joining PPM Samantha was a Vice President, Business Planning Unit Head, for Citibank in Japan for 5 years. Samantha started her career in funds management at Bankers Trust Australia Limited in 1995 as a Legal Manager and then as a Regulatory Manager and Project Financer at Bankers Trust and later at Burnvoir Corporate Finance. Samantha holds a Bachelor of Business (Marketing) and a Bachelor of Laws. She is a member of the Governance Institute of Australia.



### **Jill May, B Bus, DFP (1-4) – Senior Client Relationship Manager**

Jill joined PPM in 2018 as a Senior Client Relationship Manager and is responsible for managing our client relationships in conjunction with the Portfolio Managers, to ensure that each of our clients individual needs are met. Jill has deep experience in the financial industry and is highly skilled at developing and managing client relationships. Jill has worked at Volt Bank, FIIG Securities, Laminar Group and Lehman Brothers where she held senior sales and advisory roles in wholesale and institutional distribution. Jill holds a Bachelor of Business in Banking and Finance from Monash University and a Diploma of Financial Planning via Kaplan Professional, incorporating RG 146 compliancy.



### **Ajay Reddy, AdvDip Bus Mgt and Marketing, Dip Acctg – Operations Manager**

Ajay joined PPM in September 2017 as Operations Manager and is responsible for overseeing portfolio administration. Prior to joining PPM, Ajay was Head of Operations at Altair Assets Ltd, where he was responsible for managing and implementing operational functions. Earlier career roles were within the insurance and shipping. Ajay has over 16 years of management and operations experience in a challenging and rapidly changing financial environment.



### **Simon Michell, Dip Fin Mkts – Senior Business Development Manager**

Simon joined PPM in March 2019. He has over 30 years' experience in financial markets across a range of roles including trading, portfolio management and funds management. With a background in cash and fixed income, he has worked with institutional, middle market and corporate clients as well as individual UHNW clients both direct and through professional adviser networks. Most recently, he was Head of Intermediaries at FIIG Securities in charge of adviser services. Simon is charged with growing PPM's presence and products through financial advisers with a focus on PPM's Australian and Global SMA offering on platforms.



### **Daniel Booth, B.PsySc – Assistant Client Relationship Manager**

Daniel Booth joined the PPM team in January 2019 as an Assistant Client Relationship Manager. He works closely with the Senior Client Relationship Manager and Portfolio Managers to support our client relationships. Daniel spent the prior two years working for Westpac Banking Corporation in the retail sector developing his finance, relationship management and client servicing skills. Daniel has managed a small business and was part of the Australian Defence Force – Army Reserves for three years. Daniel holds a Bachelor of Psychological Sciences obtained from the University of New England.



### **Alexandra Versi, B.Com – Corporate Accountant**

Alex joined PPM in 2017 as the Corporate Accountant. She is responsible for all corporate accounting and financial compliance reporting. Prior to joining PPM, Alex was an operations analyst at PM Capital where she was responsible for the daily unit pricing of their funds and listed investment vehicles, dealing with various derivative products and operational complexities. She has also worked as a intermediate accountant for BDO in the Private Clients team, specialising in High Net Worth (HNW) individuals and property trusts.



### **Brooke Learmonth – Office Manager**

Brooke Learmonth joined PPM in December 2017 as the Office Manager and is responsible for the smooth and efficient management of PPM's corporate office. Brooke has a diploma of Business Administration and has experience in working in administrative rolls for over five years.