

# Accessing Global Markets through a PPM SMA returns 17%\*



With the small size and lack of diversity of the Australian sharemarket, investors need to look offshore to access a wider range of industries that offer diversification and attractive opportunities.

Larger, global companies are also a way to access exposure to emerging markets where these companies are doing business rather than having to invest direct into those markets.

A Separately Managed Account (SMA) provides significant benefits for investors when accessing global investments due to its more transparent and individual ownership structure.

With a minimum of \$50,000 investors can access direct ownership of a global equity portfolio professionally managed by an experienced investment manager with a proven capability in generating strong risk adjusted returns over the medium and long term.

In contrast to investing in a managed fund, investors have complete transparency over their holdings, do not have their tax position affected by other investors and an individual cost base is established for each investment.

An SMA is a great way for Advisers to continue to offer direct equity portfolios to their clients while gaining significant time and cost savings by outsourcing the management, execution and reporting. The PPM Global SMA makes investing in global equities easy and efficient and is currently available through the HUB24, Powerwrap and Onevue platforms.

All portfolio administration is undertaken by the platform provider, including dividends, corporate actions, tax record- keeping and reporting. Existing investments can easily be transferred into (or out of) a PPM SMA without triggering capital gains tax consequences. Investors receive annual reporting and have online access 24/7 to the holdings of their SMA portfolio.

Discover more about how you can access global equities through an SMA by contacting us at [ppm@ppmfunds.com](mailto:ppm@ppmfunds.com) or (02) 8256 3777.

Private Portfolio Managers Pty Ltd (PPM) is a privately owned boutique investment manager founded in 1995 with an established track record of constructing concentrated Australian and Global equity portfolios.

\*17.2% pa performance for the 12 months to 28th February 2019 before fees and taxes.

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