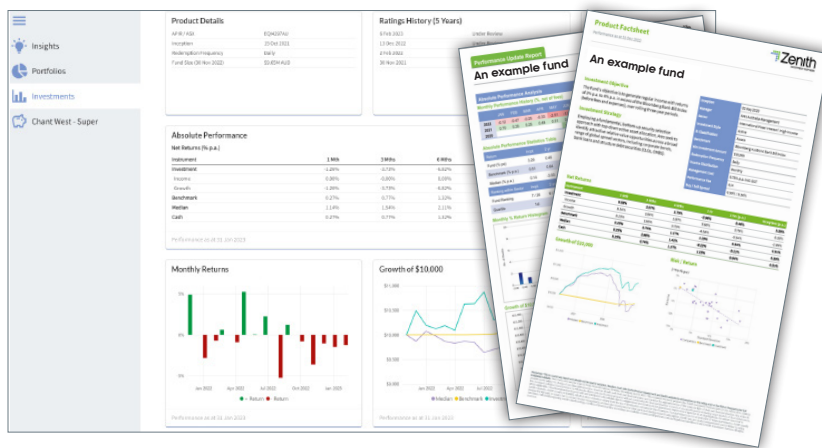


Zenith Mosaic

Access qualitative investment research, ratings and portfolio tools

Mosaic is our flagship research and portfolio insights platform, which gives you the ability to create your own portfolios and compare, filter and analyse investment solutions to meet the changing needs of your clients.

Mosaic is powered by our trusted, fund manager research, providing you with access to a growing list of over 4000 managed funds, super/pension investment options, ETFs and LICs.



You get access to:

- online fund research and ratings
- managed funds/ETFs/LICs research
- superannuation ratings and research
- fund manager documents, eg. disclosures, TMDs, manager factsheets
- market reports
- powerful portfolio analysis
- ASX 200 consensus equities, and
- Zenith platform portfolios.

Available tools

Portfolio Builder

Construct your own bespoke portfolios using Mosaic's powerful Portfolio Builder tool. Monitor your portfolio performance, take a deep dive into holdings analysis and share your portfolios with colleagues.

Analyse & Compare

Conduct deep analysis or side-by-side comparisons of your selected investments or portfolios by viewing data on performance, risk, correlation, underlying exposure plus more, all with the ability to export or print.

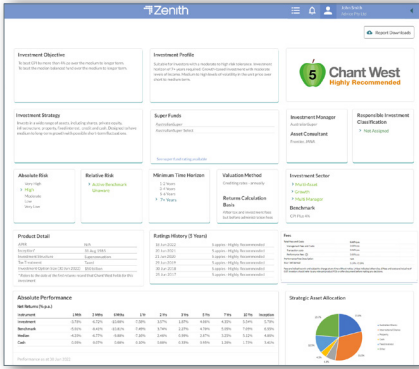
Key features

Filters

Comprehensive investment research filters help you quickly find the investments you're looking for. Create a shortlist, save your list for later, download or simply print your list.

Insights

Access Zenith's research and consulting insights. Receive research alerts, sector reviews, monthly and quarterly market reports or find related insights for products and portfolios.



Superannuation research and ratings

Better support your clients wanting retirement planning advice with detailed qualitative research and ratings assessment reports on some of the industry's major super funds. Compare superannuation/pension investments against various managed funds/ETFs/LICs on a range of metrics including investment fees, performance and risk measures to better support your clients' superannuation needs.

Responsible Investment

Our Responsible Investment tools are incorporated across our entire APL, helping advisers navigate ESG and other considerations with their clients.

- Filter using our proprietary Responsible Investment classifications which provide qualitative insights to ESG incorporation.
- Negative screening to filter out funds with exposure to common controversy practices.



Our Research offering

Our research team constantly monitor a global fund universe, collecting relevant and current data, whilst meeting with fund managers over 750 times a year to create a list of high conviction, high quality investment products. Employing a thorough, rigorous and multi-dimensional research process enables us to do so in a comprehensive manner, ensuring advisers have access to a best-of-breed list for consideration within Mosaic. The process also enables us to identify new products that might be lesser known than mainstream names, offering advisers an unbiased and continually refreshed list of investment opportunities.

Why choose Zenith Mosaic?

Powerful research and portfolio hub

Brings together all the information, intelligence and tools you need to deliver the best investment solutions for your clients.

Improve collaboration

Collaborate across your team by sharing portfolios and product lists with your colleagues.

Informed conversations

Empowers more robust and insightful client conversations with comprehensive reports optimised for printing and exporting.

Customised to your needs

Customise portfolios, product lists and analysis to meet the unique needs of your business.

Find out more

For more information visit zenithpartners.com.au or contact our helpful business development team via the below contact details.



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