



# Zenith asset allocation

## Critical insights for investment decision makers

Making investment decisions that are appropriate for both the shorter and longer-term economic and investment environment is one of the most significant considerations when generating active returns. Strategic, data-driven asset allocation advice and support can deliver critical insights which add value during the investment decision-making process.

At Zenith, the core of our asset allocation service is the delivery of tailored, objective asset allocation and investment strategy support to meet the dynamic and strategic requirements of your business. With a wealth of experience developing and executing asset allocation strategies for clients including wealth managers, advice groups and super funds, we leverage our proprietary tools which power our range of insights and analytics to support informed investment decisions.

## Our services

Our asset allocation services are broad and can be tailored for the individual needs of your practice. Services include dynamic asset allocation (DAA) guidance, strategic asset allocation (SAA) support and monthly market updates.

### Asset allocation & strategy

- DAA & strategy report (monthly)
- SAA report (annual); capital market assumptions and portfolio construction
- Develop & provide bespoke DAA indicators
- DAA strategy presentations to investment committee
- Investment committee member

### Investment strategy & economic chartpacks

- Valuations report (monthly)
- Observations report (irregular)
- Video/podcasts (fortnightly)
- Extremes & divergence (irregular)
- Asset allocation (weekly)

### Report & tools

- Investment bulletin (monthly)
- Client specific reports (monthly)
- StrategyEngine
- SE Portal

## The Zenith investment philosophy

Our team's well-developed investment philosophy is informed by many decades of experience allocating assets in a diverse range of market conditions and scenarios. The team:

- believes markets are inefficient over some time horizons and active management creates a critical driver of value
- prefers diversification over concentration when it comes to DAA tilts and in formulating SAA
- prefers an objective, data-driven investment process with a qualitative overlay
- seeks to maximise the sources of return using absolute, directional, relative value and different time horizons, rather than large one-off, concentrated positions
- believes risk management and return attribution are key, and
- recognise that investment environments change and investment processes need to constantly improve.

## Our team

Zenith's asset allocation team is led by Damien Hennessy, a highly experienced investment strategist and economist who has built his expertise over more than 30 years working across funds management, asset allocation and investment strategy. In 2021, Zenith acquired dedicated asset allocation business, Heuristics Investment Systems, which was the brainchild of Damien and experienced investment professional Nicholas Hugh.



**Damien Hennessy**  
Head of Asset  
Allocation

The team has been providing industry fund and private wealth clients with asset allocation recommendations and investment strategy advice for nearly 20 years through a variety of market conditions.

## Our service offering

**Core service offering** Quarterly Investment Committee: macro, DAA and markets update  
Monthly DAA model/investment strategy pack  
Weekly and monthly market updates and investment bulletins

**Additional services** SAA and capital markets assumptions annual review  
Access to macro and markets insights, charts and data as required  
Access to Zenith's investment product research and comparison portal, Mosaic

## Why Zenith for asset allocation?

With nearly two decades' experience delivering tailored, data-driven asset allocation advice and support through a variety of market cycles and economic scenarios, our asset allocation service delivers unique benefits to clients.

- Strategic asset allocation from an Australian perspective
- A long-term asset allocation track record in both SAA and DAA
- The ability to provide data-driven, objective, interactive and customised asset allocation advice
- Access to proprietary, tailored economic and DAA indicators
- Bespoke strategy and project support to meet unique investment needs
- Access to a wealth of resources and valuable tools to support more detailed investment conversations

## Looking for more information?

If you'd like more information about our asset allocation solution or our existing suite of actively managed portfolios, please contact our helpful business development team via the below contact details.



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