

# About Zenith Investment Partners

Zenith Investment Partners is one of Australia's most respected research and investment consultancies, with a 20-year track record of delivering premium investment research, fund ratings and investment portfolio solutions for financial advisers.

Today, Zenith supports a rapidly growing number of advisers nationally with research and ratings on over 1,000 investment products and managing more than 100 investment portfolio solutions for clients – both off-the-shelf and customised portfolios. Zenith is distinguished by the quality and stability of their in-house research team which also delivers critical inputs to the ongoing success of their managed portfolios consulting service.

As one of the first multi-asset managed account providers in Australia, Zenith has built a wealth of knowledge on the development and management of managed accounts, currently managing over \$5 billion in client assets as of August 2024.

## Why choose Zenith?



### Managed account expertise

For almost 15 years, Zenith has been building portfolios for advisers and running managed accounts for 10 years. With their experience and expertise, they help your adviser deliver well researched and thoughtfully constructed portfolios.



### Dedicated research team

Zenith's dedicated and stable in-house research team provides extensive specialist knowledge that's core to their managed account offering. With 20 research analysts, Zenith has the largest dedicated research team in the Australian market which your adviser has access to for indepth sector specific insights as required.



### Portfolio construction methodology

Zenith's highly experienced consulting team build balanced and diversified portfolios, utilising sophisticated tools to ensure portfolios are free from style bias and minimise unintended risks. Quarterly Investment Committee meetings provide them with a formal opportunity to review the market outlook and identify any opportunities to enhance the portfolios.



### Macro outlook with an Australian investor lens

Zenith's proprietary systems enable them to collect and make sense of macroeconomic data to help form their views and position portfolios accordingly to maximise returns and minimise risk, specific for the Australian investor.



### Meticulous portfolio monitoring and rebalancing

All Zenith portfolios undergo constant and considered monitoring, with formal internal weekly reviews and quarterly reviews with your adviser. Our disciplined approach provides us with the opportunity to make any necessary portfolio decisions efficiently to optimise investment outcomes.



### 'Best of breed' reporting

Your adviser has access to Zenith's unique and leading technology portal where they can access Zenith's suite of in-depth portfolio data and reports to help communicate how your portfolio is positioned and has been performing.