Zenith
INVESTMENT PARTNERS
An FE fundinfo Company

Asset Allocation Advice

Critical insights for investment decision makers

Access the expertise of our experienced Asset Allocation team and leverage their wealth of knowledge, data and analysis to build robust portfolios.

Designed for advice practices that manage their own portfolios, we serve as your trusted third-party adviser to strengthen and, at times, even reshape your investment strategies. With our comprehensive analysis, meticulously curated reports and invaluable insights, we provide you with the framework, expertise, discipline and support needed to navigate the noise and volatility in markets and build robust portfolios.

Our services

	Asset Allocation Subscription	Premium Asset Allocation Subscription
Dynamic Asset Allocation (DAA) Report	✓	✓
Quarterly DAA Review Webinar	✓	✓
Macro updates & investment insights	✓	✓
Mosaic subscriptions	✓	✓
IC meetings & Board presentations		✓
Additional Asset Allocation consultations		✓
Capital Markets Assumptions review		✓
Annual SAA Review		Optional

Benefits

- Assistance with building robust and diversified portfolios
- SAA & DAA advice tailored to your portfolios
- 3rd party advice on how to navigate changing market conditions
- Practical insights you can share with clients and board members
- Access to highly regarded and experienced asset allocation professionals

How we can help you

Australian perspective

Investing in a global market is one thing, but understanding the local impacts for your clients is another. Our strategic asset allocation advice provides insight from an Australian perspective.

Data-driven

As a data business, we have access to a wealth of investment and economic data and systems. This gives us the power to provide objective, interactive, and customised Asset Allocation advice.

Expert advice

With nearly two decades of experience, we have a strong track record in both Strategic Asset Allocation and Dynamic Asset Allocation across a variety of market cycles and economic scenarios.

Tailored to your business

We understand that every business and its clients have different requirements. We listen to what you need to provide the best, bespoke strategy and project support to meet your unique investment goals.

Leading edge tools

As experts in our field, we leverage our proprietary StrategyEngine platform to test and build your Dynamic Asset Allocation indicators. We treat every portfolio on a case-by-case basis to ensure the investment goals are considered.

Additional resources

You receive access to a wealth of resources and valuable tools to support and inform your detailed investment conversations. We keep you in the loop with regular market insights, research, and reporting at your fingertips.

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.

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.

Damien Hennessy
Head of Asset Allocation

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.

03 9642 3320

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