

Zenith specialist portfolios

Leading the way in managed account solutions

For more than two decades, Zenith has been delivering premium research and portfolio construction services to the Australian market. Our services are designed for retail financial advisers, by industry experts.

Why choose a Zenith managed account?



Managed account expertise

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 these investment structures. We have a 12-year track record managing portfolios on the CFS FirstChoice platform.



Portfolio construction and management

Our industry leading portfolio management team build balanced and diversified portfolios, focussing on active outperformance and downside risk management and utilising sophisticated tools to optimise investment outcomes for clients. All Zenith portfolios undergo continual and considered monitoring, with formal weekly reviews of any risk band breaches and required portfolio rebalancing.



'Best of breed' reporting suite

Unique to Zenith, our Mosaic platform gives clients access to comprehensive portfolio dashboards which provide detailed portfolio performance, holdings and underlying exposure information. Mosaic also offers access to a suite of in-depth monthly and quarterly portfolio reports to help advisers communicate portfolio updates with their clients.



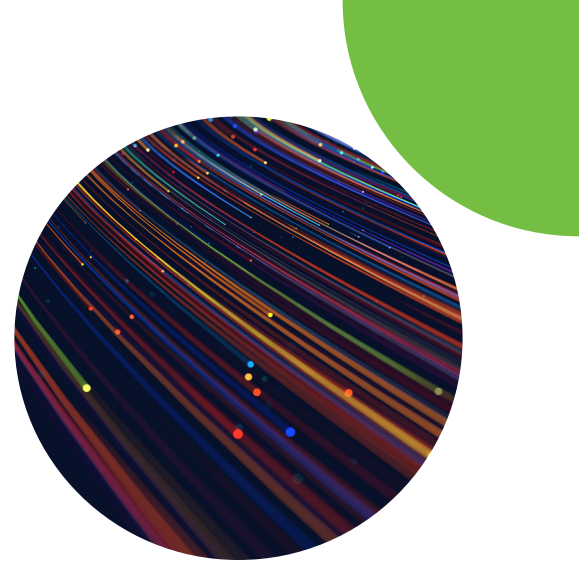
Dedicated research team

Our dedicated and stable in-house research team provides extensive specialist knowledge that is core to the ongoing success of our managed account portfolios. Zenith managed account clients have access to our sector specialists who can provide in-depth insights into specific funds and sectors when needed.



Deep knowledge of adviser needs

Zenith has been partnering with financial advisers for 20 years, working closely with advisers to understand the needs of their clients. This wealth of experience is central to the design of our products and services.





Our specialist portfolios on CFS FirstChoice

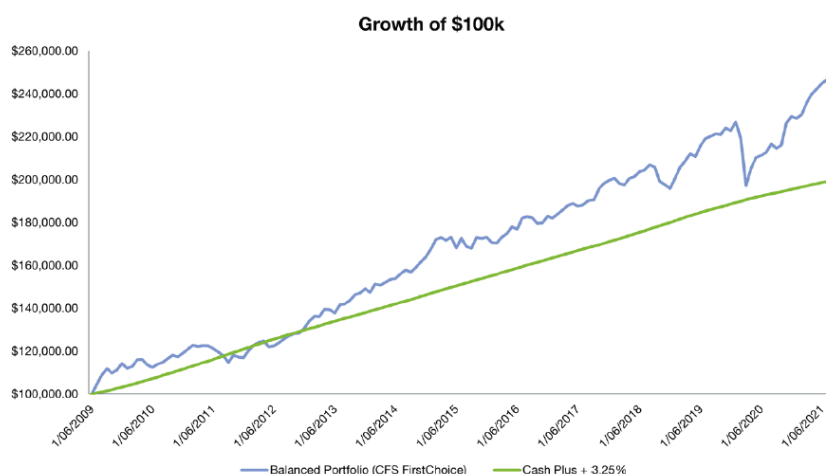
Zenith offers five specialist portfolios across both pension and super products on the CFS FirstChoice platform.



- Zenith Active Conservative Portfolio (CFS FirstChoice)
- Zenith Active Moderate Portfolio (CFS FirstChoice)
- Zenith Active Balanced Portfolio (CFS FirstChoice)
- Zenith Active Growth Portfolio (CFS FirstChoice)
- Zenith Active High Growth Portfolio (CFS FirstChoice)

Historical portfolio performance

Zenith has been operating a series of 5 risk profiles on the CFS platform since June 2009. The new CFS Specialist Portfolios which commenced on 27 September 2021 utilise the same investment philosophy, portfolio construction methodology and consulting team as the previous portfolios. However, they are new portfolios and past performance is no indication of future performance.



Find out more

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



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