

Zenith managed accounts

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 guide financial advisers through the entire process, using our extensive understanding of each platform to ensure a seamless transition and integration.



'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 portfolio reports to help advisers communicate portfolio updates with their clients.



Deep knowledge of adviser needs

Zenith has been partnering with financial advisers since its inception in 2002. Our Directors have worked closely with advisers to understand the needs of their clients for almost 20 years. This wealth of experience is central to the design of our products and services.



Meticulous portfolio monitoring and rebalancing

All Zenith portfolios undergo constant and considered monitoring, with formal weekly reviews of any risk band breaches and required portfolio rebalancing. Our disciplined approach provides us with the opportunity to make any necessary portfolio decisions efficiently and optimise investment outcomes for our clients.



Portfolio construction methodology

Our 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 us with the opportunity to review each asset class, identify any underperforming managers or changes in market outlook, and explore new options for the portfolio.






Dedicated research team

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



We recognise the considerable opportunity managed accounts provide, as they fast become the preferred method of investing for Australian financial advisers. Driven by advances in technology, evolving investor needs and innovation in administrative systems, managed accounts can deliver higher performance potential, stronger compliance and substantial administrative efficiencies to financial advisers and their clients.

Our managed account offering

-  **Elite Blends**
- The Elite Blends portfolios are our premium portfolio suite. Launched in 2009, they invest in active managed funds that have consistently delivered above-average risk-adjusted returns. There are five risk profiles available, designed to deliver a range of consistent returns above cash for varying risk profiles. Long-term performance of our Elite Blends is available upon request.
-  **Essentials**
- Our Essentials portfolios are designed to provide exposure to a diversified range of quality active fund managers using a cost aware approach. Launched in 2019, they're designed to deliver on their cash plus objectives through all markets over the investment timeframe with minimum risk.
-  **Customised**
- We're a leading provider of customised managed account solutions designed to match the unique requirements of each advice business and their clients. We partner with advisers to convert their paper portfolios into a managed account structure and then undertake all necessary portfolio construction, documentation, implementation and ongoing management on their behalf.

Platform	Elite Blends	Essentials	Customised
HUB24	✓	✓	✓
Netwealth	✓	✓	✓
AMP MyNorth	Coming soon	✓	✓
BT Panorama	✓	✓	✓
Colonial FirstWrap	✗	✗	✓
Powerwrap	✗	✗	✓
Macquarie Wrap	✗	✗	✓

Find out more

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