

Antares Equities SMA Fact sheet

Specialist portfolios that can be a core or a complement to your Australian equity allocation: actively managed by an experienced team of bottom-up stock pickers, the portfolios range from concentrated to income-focused to mid-caps.

Why invest in Antares Equities Model portfolios?

- Access Antares expertise in managing Australian equities model portfolios since 2010.
- Harness the benefits of managed accounts, offering you and your clients increased transparency and outsourced execution
- Know that Antares is owned and backed by Insignia Financial, one of Australia's most established wealth managers
- Efficiently meet your compliance and admin burden with professionally managed and monitored portfolios
- Enhanced client experience via practical client engagement tools and regular portfolio communications

What differentiates Antares?

- We believe that active management generates superior long-term returns because markets are inefficient.
- These market inefficiencies can be exploited, and excess profits captured by:
 1. Being style agnostic
 2. Gaining deep insight
 3. A systematic application – that includes integrating ESG and sustainability research
 4. Being patient
- Having the right team and a robust process is essential to achieving this.

How are the portfolios managed?

- Each Model is managed by a Portfolio Manager who is supported by a Deputy Portfolio Manager(s) with research and stock analysis undertaken by eight members of the team.
- Antares uses a proprietary stock selection process that is common to all Model Portfolios that include:
 - Information gathering
 - Financial modelling
 - ESG & sustainability analysis
 - Identification of high conviction (whether buy or sell) stocks
- Portfolio construction reflects each Model's investment objective and includes:
 - Stock Classification
 - Portfolio Construction
 - Risk management

Where do we invest?

Since 1994 Antares has managed portfolios exclusively focused on Australian shares.

Portfolios at a glance

Model Portfolio	Dividend Builder	Elite Opportunities	Ex 20 Australian equities
	Income with capital growth	Concentrated high conviction	Actively investing in mid cap growth
Description and investment objective	It seeks to deliver regular tax-effective income by identifying and investing in companies with sustainable, and where possible, franked dividends and provide moderate capital growth over rolling five-year periods.	An actively managed, concentrated, high conviction portfolio of Australian listed equities that Antares has identified as having the potential to offer capital growth over the long term. Its objective is to outperform the 'Benchmark' over rolling five-year periods.	Invests in shares from outside the largest 20 companies by market capitalisation that Antares identifies as having the potential to offer significant long-term capital growth. Its objective is to outperform the 'Benchmark' over rolling five-year periods.
Benchmark	S&P/ASX 200 Total Return Index	S&P/ASX 200 Total Return Index	S&P/ASX 200 Total Return Index excluding the companies listed in the S&P/ASX 20 Total Return Index
Fees	Contact your platform provider		
Securities in the portfolio	Maximum 30	Maximum 35	Maximum 30
Minimum investment	Contact your platform provider		
Platform availability	Expand Extra, Grow Wrap, Voyage, BT Panorama, Macquarie, Praemium, Netwealth, Powerwrap	Expand Extra, Grow Wrap, Voyage, Macquarie, Praemium, Netwealth, Powerwrap	Expand Extra, Macquarie, Praemium, Netwealth, Powerwrap, BT Panorama
Ratings	Lonsec: Investment Grade	Lonsec: Investment Grade	Lonsec: Investment Grade

Reporting and support

Our range of simple, easy-to-understand reports cover the latest portfolio performance, performance drivers, information on top holdings and sector allocations.

What are the risks?

All investments carry different levels of risk, and these should be considered prior to investing.

Many factors influence an investment's value. These include, but aren't limited to: investment market sentiment; economic conditions; changes in inflation, interest rates or the value of the Australian dollar; company-specific issues; liquidity; risks associated with certain investment techniques, such as derivatives and currency management.

Find out more

For more information, please visit antaresequities.com.au or contact us on **1800 671 849**.

The Antares Ex-20 Australian Equities model portfolio won the 2022 Financial Newswire/SQM Research Fund Manager of the Year Awards. Furthermore, the Antares Blue Chip Top 20 SMA model portfolio was awarded 'Highly Commended' at the 2023 Financial Newswire/SQM Research Fund Manager of the Year Awards.



Important information: This document has been prepared by Antares Capital Partners Ltd ABN 85 066 081 114, AFSL 234483 (Antares) for licenced financial advisers only. Antares is the investment manager for Antares Equity Model Portfolios referred to in this document (each a Model Portfolio). Advisers must not distribute this document or any part of it to retail clients or to any other person. This document has been prepared without taking into account any person's individual objectives, financial situation or needs.

Advisers should therefore, before acting on information in this document, consider its appropriateness, having regard to their client's particular objectives, financial situation or needs. Advisers also need to consider the relevant disclosure documents of providers or platforms that offer the Model Portfolio for investment before recommending a Model Portfolio to their clients. Antares is a part of the Insignia Financial Group of companies, comprising Insignia Financial Ltd ABN 49 100 103 722 and its related bodies corporate ('Insignia Financial Group'). The capital value, payment of income and performance of any financial product offered by any member of the Insignia Financial Group, including but not limited to Antares, is not guaranteed and is subject to investment risk, including possible delays in repayment of capital and loss of income and principal invested. Past performance is not a reliable indicator of future performance. Returns are not guaranteed and actual returns may vary from any target returns described in this document.

Research House disclaimers for Antares Elite Opportunities, Antares Dividend Builder and Antares Ex-20:

The ratings issued 10/2024 for the Antares Dividend Builder Model Portfolio, Antares Elite Opportunities Model Portfolio and Antares Ex-20 Australian Equities Model Portfolio are published by Lonsec Research Pty Ltd ABN 11 151 658 561 AFSL 421 445 (Lonsec). Ratings are general advice only, and have been prepared without taking account of your objectives, financial situation or needs. Consider your personal circumstances, read the product disclosure statement and seek independent financial advice before investing. The rating is not a recommendation to purchase, sell or hold any product. Past performance information is not indicative of future performance.

Ratings are subject to change without notice and Lonsec assumes no obligation to update. Lonsec uses objective criteria and receives a fee from the Fund Manager. Visit lonsec.com.au for ratings information and to access the full report. © 2024 Lonsec. All rights reserved.