HUB24 Discover

2023 Platform Competitive Analysis and Benchmarking Report
Best Platform Managed Accounts Functionality
WINNER HUB24

HUB24 Discover is an innovative, cost-effective managed portfolio platform and investment solution designed to support the needs of more of your clients throughout their wealth accumulation and retirement journey.

HUB24 Discover provides a streamlined selection of managed portfolios by leading portfolio managers on our award-winning HUB24 platform.

Portability to support wealth journey

Simplified fee structure

Select range of managed portfolios

More power to service your clients on our award-winning platform.[1]

HUB24 Discover complements our existing HUB24 Investment menus. As your clients' needs evolve, they can transition to our Core and Choice menus and access the benefits of a wider range of investment options while retaining the same account and underlying investments without incurring significant costs or CGT.[2]

Discover

Our Discover menu provides cost-effective access to a streamlined selection of managed portfolios by leading portfolio managers.

Core

Our Core menu provides your clients access to a select range of investment options, with the benefit of lower minimum administration fees and no account keeping fee.

Choice

Our Choice menu offers your clients a full suite of investment options, allowing greater choice and flexibility.

Benefit from innovative online capabilities to drive business efficiencies

Automatic investment plan to optimise your investment strategy and create value for your clients with dynamic asset allocation.

Digital advice fee consent to support you with your regulatory obligations.

Online tax deduction tool to help reduce paperwork and streamline the Notice of Intent process.

Same day withdrawals with enhanced processing times for super benefit payments and pension withdrawals.

Online account application and straight through processing to set up new clients quickly and efficiently.

Meet the HUB24 Discover portfolio managers

AZ SESTANTE
AZIMUT GROUP

AZ Sestante is a specialist investment consultant focused on designing and managing a range of multi-manager model portfolios via SMAs, MDAs, and fund of funds.

We believe the majority of a portfolios return is generated by its asset allocation, hence our philosophy and processes focus on dynamic asset allocation. Portfolios are created using a blend of active and passive investments using managed funds and ETF's.

Our portfolios exhibit tactical biases and can be considered 'style neutral' usually reflecting our prevailing investment outlook and/or current relative market valuations at that time underpinned by research from our global team.

Our parent company Azimut, Italy's largest independent asset manager, was established in 1989 and listed on the Italian stock exchange in 2004. The group manages over $150 billion in assets under administration globally including over AUD$8 billion in multi-manager solutions.

betashares

Established in 2009, Betashares serves thousands of advisers and over 1 million investors, and manages more than $30 billion across Australia's broadest range of ETFs.

Guided by our core principles - simplicity, cost-effectiveness and transparency - our aim is to help your clients reach their investment goals.

Betashares Dynamic Managed Accounts are robust, diversified and low-cost by design. They deliver value through dynamic asset allocation, best of breed selection and utilisation of smart beta strategies. Total portfolio fees are typically lower than the costs of traditional portfolios and active model managers.

BlackRock

BlackRock's purpose is to help more and more people experience financial well-being. As a fiduciary to investors and a leading provider of financial technology, we help millions of people build savings that serve them throughout their lives by making investing easier and more affordable. For additional information on BlackRock, please visit www.blackrock.com/au

ELSTON

Elston Asset Management is an Australian investment management firm that was established in 2011. Elston currently manages over $6 billion on behalf of investors across Australia, with a focus on multi-asset and Australian equities investment solutions. Our highly experienced and qualified investment team follows a disciplined and repeatable process, constantly analysing portfolios, economic conditions and asset allocation exposures to ensure investor portfolios stay on course. We offer a range of cost effective and actively managed portfolios that are diversified across growth asset classes such as Australian and international equities, property and infrastructure; and defensive-oriented asset classes, such as cash and fixed interest securities. All of our portfolios are managed to a core investment philosophy that focuses on genuine diversity, liquidity and helping investors build and preserve their wealth.

Lonsec

The Lonsec Group is a pivotal force within Australia's financial advice and investment industry, encompassing market-leading brands, Lonsec Research, Lonsec Investment Solutions, SuperRatings, and Implemented Portfolios. Our unique position allows us to play a fundamental role in building investment capabilities for financial advisers, licensees, fund managers and superannuation funds by delivering practical, actionable insights that significantly enhance the value of their investment and advice solutions.

For over 14 years, we have been a trusted partner on the HUB24 Platform, providing model portfolios backed by our award-winning investment research and a highly experienced investment team. With over a 20+ year track record of managing investments through various market cycles, Lonsec provides a diverse suite of managed accounts tailored to meet clients' varying needs, seamlessly integrating research-driven investment ideas with dynamic asset allocation and active selection.

Our investment research-driven approach to portfolio construction is underpinned by four key beliefs:

- Dynamic management
- High-quality assets
- Risk management
- Diversification

Find out more about the portfolios from Lonsec.

Morningstar

Morningstar, Inc. is a Global leading provider of independent investment research in North America, Europe, Australasia, and Asia. The company offers an extensive range of products and services for advisers, AFSL's, investors and asset managers. The company has operations in 27 countries. Morningstar has over 170 equity and credit analysts globally, covering approximately 1,600 stocks and 700 debt issuers, as well as over 100 fund research analysts covering approximately 4380 funds, making it one of the largest independent research teams in the world.

Morningstar Medalist Core managed accounts deliver Morningstar's best ideas, harnessing their unique set of capabilities across independent fund research, asset allocation, and portfolio construction. Morningstar's global scale and decades of managed portfolio heritage enable them to deliver reduced fees from underlying fund managers, resulting in both reduced administration and a competitive offering that demonstrates their commitment to putting investor interests first. Available across a suite of six risk profiles, these portfolios use active, multi-asset strategies where reasonable outperformance is persistently available and passive strategies where it is not, ensuring your clients have a robust, research-led investment solution designed to empower their financial success.

Vanguard

With $12.6 trillion in assets under management globally as of 31 December 2023, including $3.7 trillion in ETFs, Vanguard is one of the world's largest global investment management companies.

In Australia, Vanguard has been serving financial advisers, retail clients and institutional investors for over 25 years.

Zenith Investment Partners

Zenith Investment Partners is a leading investment research and managed account provider, with a 20-year track record of delivering premium investment research, fund ratings and investment portfolio solutions to advisers. The business is distinguished by the quality of its internal capabilities in asset allocation, strategy selection and investment research, which are critical to the ongoing success of its managed portfolio operations.

Zenith's Dynamic ETF portfolios are designed to suit investors seeking a cost-effective, actively managed investment solution. With a robust strategic asset allocation, these portfolios offer exposure to a wide range of markets and assets through various ETF providers. The portfolios also incorporate an active investment strategy with a proprietary dynamic asset allocation overlay, enabling the team to tactically maximise market opportunities.

In 2021, Zenith joined the global FE fundinfo Group, an investment data and technology leader with a long history of working with fund managers, platforms and advisers to provide expert insights and trusted information to drive better investment decisions.

Want to know more?

Call our team on **1300 854 994** or visit hub24.com.au

HUB24

[1] HUB24 was rated Best Platform Overall, Best Platform Managed Accounts Functionality, Best Mobile Platform, Best in Reporting and Best in Online Business Management in the 20223 Investment Trends Platform Competitive Analysis and Benchmarking Report.

[2] Where portfolios are different, part of the portfolio may trigger some capital gains tax (CGT) and other costs to realign the portfolio to the chosen option.