

CoreSeries Innovation

Improving platform technology has seen a considerable uptake in managed portfolios based on improved transparency, execution and administrative efficiencies. CoreSeries builds upon these features through a range of innovative qualities:



Keeping fees low without sacrificing quality

CoreSeries leverages BT's scale and pricing relationships with best-of-breed managers to deliver quality portfolios at a compelling price-point.

- Simple, straightforward pricing structure with no headline investment management fee.
- Not constrained to the use of funds available on platform, the RE has the flexibility to negotiate fees, curate and optimise underlying mandates with managers to enhance portfolio returns and manage risk.



Innovative structure to improve product efficiencies

The unique fund structure brings greater efficiency and flexibility to traditional Managed Portfolios:

- Off-platform manager transitions reduce time out of the market, transaction costs and minimise potential tax consequences.
- Full transparency of underlying securities for timely performance attribution and enhanced reporting.
- Supports greater compliance and risk monitoring.



Access to a dedicated team of investment specialists

CoreSeries Managed Portfolios are supported by an experienced team of specialists that can assist with any informational requirements on markets and the portfolios.

- Regular webinars and live events from the BTIS investment team and underlying investment managers.

CoreSeries has a dedicated website allowing advisors to quickly access relevant content and up-to-date reports on the portfolios:

Monthly & Quarterly

Performance reports including detailed commentary.

Monthly Exposures

Detailing top ten holdings across each asset class and underlying manager.

Portfolio Update

Providing rationale when there is a change to the SAA or underlying manager composition.

Underlying Manager Profiles

Summary about each underlying manager as well as "Meet the Manager" videos.

For more information

bt.com.au/CoreSeries | 1800 222 790; Option 2.



Disclaimer

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