

# Lonsec Investment Research

## Research Supplier to Hunter Green

Lonsec makes available a range of research products and investment tools to Hunter Green via our iRate website. As one of Australia's leading investment and research organisations, these products are designed to complement and strengthen your investment advice.

Specially discounted for Hunter Green advisers, the following packages are available:

<p><b>iRate Silver — Research</b></p> <p><u>Market Reports</u></p> <ul style="list-style-type: none"> <li>• Daily Bulletins</li> <li>• <i>Month in Review</i></li> <li>• <i>Investment Outlook Report</i></li> </ul> <p><u>Fund Research</u></p> <ul style="list-style-type: none"> <li>• Full suite of research</li> <li>• Data on 10,000+ funds</li> <li>• Managed Fund Model Portfolios</li> <li>• ETFs</li> <li>• LICs</li> <li>• Industry funds</li> </ul> <p style="background-color: white; color: #4a697d; padding: 5px;"><b>= \$83 per month ex GST</b></p>	or	<p><b>iRate Gold — Research + Tools</b></p> <p><u>iRate Silver</u></p> <p><u>Portfolio Construction</u></p> <ul style="list-style-type: none"> <li>• Construct model and client portfolios</li> <li>• Track time-series portfolio changes</li> <li>• Compare up to five portfolios</li> </ul> <p><u>Quantitative Analysis</u></p> <ul style="list-style-type: none"> <li>• Generate up to 16 charts</li> <li>• Export data and charts</li> <li>• Full report customisation</li> </ul> <p style="background-color: white; color: #8c8c4a; padding: 5px;"><b>= \$150 per month ex GST</b></p>	+	<p><b>iRate Equities</b></p> <p><u>Listed Equities</u></p> <ul style="list-style-type: none"> <li>• S&amp;P ASX200 Equity Research</li> <li>• Approved/Not approved rating scale</li> <li>• Growth and income characteristics</li> <li>• Two-page report suitable for an SOA</li> <li>• Daily updated</li> <li>• Corporate action reports</li> <li>• Daily rating change alerts</li> </ul> <p style="background-color: white; color: #4a2c7d; padding: 5px;"><b>= \$67 per month ex GST</b></p>
--	----	---	---	---

Discover why over 3000 financial advisers subscribe to Lonsec research by registering for a complimentary two week trial via the iRate website: [irate.lonsec.com.au](http://irate.lonsec.com.au)

### About Lonsec

Lonsec provides financial professionals with integrated market intelligence and investment services. Our expert team of experienced investment analysts and consultants provide in-depth insight and analysis, practical asset allocation and portfolio construction advice.

### About iRate

iRate is a website designed to help financial professionals choose the most suitable investment products to meet the individual needs of investors, with the support of a large research analyst team available to talk directly to subscribers.

To learn more about Lonsec research, please contact:

**Chris Schroder**  
**GM — Business Development**  
 E: [chris.schroder@lonsec.com.au](mailto:chris.schroder@lonsec.com.au)  
 P: +61 (3) 9623 6346  
 M: 0423 736 705

**Dan McAleer**  
**Strategic Relationship Manager**  
 E: [dan.mcaleer@lonsec.com.au](mailto:dan.mcaleer@lonsec.com.au)  
 P: +61 (3) 9623 6397  
 M: 0415 792 911

## Lonsec Investment Research

---

**IMPORTANT NOTICE:** This document is published by Lonsec Research Pty Ltd ABN 11 151 658 561, AFSL No. 421 445 and Lonsec Limited ABN 56 061 751 102, AFSL 246842 (together referred to as "Lonsec"). Please read the following before making any investment decision about any financial product mentioned in this document.

**Disclosure as at the date of publication:** Lonsec receives brokerage or other benefits (e.g. application fees) for dealing in listed financial products and Lonsec's associated companies or introducers of business may directly share in the brokerage or benefits. Lonsec receives fees from fund managers or product issuers for researching their financial product(s) using comprehensive and objective criteria. Lonsec receives subscriptions for providing research content to subscribers including fund managers and product issuers. Lonsec receives fees for providing investment consulting advice to clients, which includes model portfolios, approved product lists and other advice. Lonsec's fees are not linked to the product rating outcome or the inclusion of products in model portfolios, or in approved product lists. Lonsec and its representatives, Authorised Representatives and their respective associates may have positions in the financial product(s) mentioned in this document, which may change during the life of this document, but Lonsec considers such holdings not to be sufficiently material to compromise any recommendation or advice.

**Warnings:** Past performance is not a reliable indicator of future performance. Any express or implied rating or advice presented in this document is limited to "General Advice" (as defined in the Corporations Act 2001 (Cth)) and based solely on consideration of the investment merits of the financial product(s) alone, without taking into account the investment objectives, financial situation and particular needs ('financial circumstances') of any particular person. It is not a personalised service and does not constitute a recommendation to purchase, redeem or sell the relevant financial product(s).

Before making an investment decision based on the rating(s) or advice, the reader must consider whether it is personally appropriate in light of his or her financial circumstances, or should seek independent financial advice on its appropriateness. If our advice relates to the acquisition or possible acquisition of particular financial product(s), the reader should obtain and consider the Investment Statement or Product Disclosure Statement for each financial product before making any decision about whether to acquire a financial product.

Where Lonsec's research process relies upon the participation of the fund manager(s) or product issuer(s) and they are no longer an active participant in Lonsec's research process, Lonsec reserves the right to withdraw the document at any time and discontinue future coverage of the financial product(s).

**Disclaimer:** This document is for the exclusive use of the person to whom it is provided by Lonsec and must not be used or relied upon by any other person. No representation, warranty or undertaking is given or made in relation to the accuracy or completeness of the information presented in this document, which is drawn from public information not verified by Lonsec. Financial conclusions, ratings and advice are reasonably held at the time of completion but subject to change without notice. Lonsec assumes no obligation to update this document following publication. Except for any liability which cannot be excluded, Lonsec, its directors, officers, employees and agents disclaim all liability for any error or inaccuracy in, misstatement or omission from, this document or any loss or damage suffered by the reader or any other person as a consequence of relying upon it.