Attivo Investments

Attivo Investments: Delivering Value to Financial Planners.

Key benefits for Financial Planners

Attivo Investments combines **expertise, education, and support** to help Financial Planners deliver **maximum value to their clients.**

Multiple MPS Strategies for life stages

Strategies for client wealth accumulation, withdrawal, and preservation allowing Planners to manage separate aspirations within a single cohesive framework proving clarity and flexibility.

Multiple strategies for investment preferences and experience

Low-cost passive model portfolios for cost only driven clients, active managed solutions balancing performance and value for the core investor and solutions for high net worth or experienced investors.

Alignment with Financial Planning conversations that Planner has with client

Our approach integrates investment management into the financial planning process, ensuring the model portfolios align with client's life goals, timelines and risk capacity. This simplifies conversations and creates a cohesive, transparent strategy.

Professional development and engagement

Annual CIO events, plus direct access to CIO and MPS Manager.

Comprehensive client support materials

Client facing brochures, fact sheets, and additional research for complex clients.

Comprehensive support and resources

A resource hub through the website that offers planners collateral, guides, brochures, and annual review support for model portfolios to enhance client conversations, simplify investment complexities and communicate progress effectively.

Diligent Portfolio management

Daily monitoring, ensuring alignment with goal-based outcomes.

Scale and brand presence with SEI strategic partnership

Our SEI partnership provides access to world-class investment managers across different asset classes.

Transparent and competitive pricing

No hidden fees or surprises. We offer clear, straightforward pricing that makes active investment strategies accessible to more people.

Manager of Manager investment approach

Ensuring transparency, best of breed managers and decisions made within a fund structure reducing the number of trades subject to CGT thresholds. CGT may still be payable.

Strong back-tested performance

Strategy	1 Year Returns	3 Year Returns	5 Year Cumulative
Attivo Investments Low-Cost Preservation Conservative	6.97%	2.53%	7.44%
Attivo Investments Low-Cost Preservation Cautious	10.05%	4.93%	14.57%
Attivo Investments Low-Cost Preservation Moderate	12.74%	5.81%	20.55%
Attivo Investments Low-Cost Accumulation Progressive	19.37%	15.44%	44.60%
Attivo Investments Low-Cost Accumulation Balanced	16.06%	9.57%	31.06%
Attivo Investments Low-Cost Accumulation Growth	24.13%	26.13%	66.76%

Strategy	1 Year Returns	3 Year Returns	5 Year Cumulative
Attivo Investments Core Withdrawal Moderate	11.70%	7.29%	12.63%
Attivo Investments Core Preservation Conservative	7.51%	3.82%	7.68%
Attivo Investments Core Preservation Cautious	10.65%	8.07%	15.25%
Attivo Investments Core Preservation Moderate	13.89%	10.43%	23.15%
Attivo Investments Core Accumulation Progressive	21.85%	21.59%	51.75%
Attivo Investments Core Accumulation Balanced	17.88%	15.35%	37.52%
Attivo Investments Core Accumulation Growth	26.75%	32.40%	73.14%

Strategy	1 Year Returns	3 Year Returns	5 Year Cumulative
Attivo Investments Apex Preservation Conservative	7.29%	4.50%	8.18%
Attivo Investments Apex Preservation Cautious	10.32%	9.35%	16.45%
Attivo Investments Apex Preservation Moderate	13.71%	11.94%	25.79%
Attivo Investments Apex Accumulation Progressive	20.81%	20.36%	50.59%
Attivo Investments Apex Accumulation Balanced	17.01%	15.28%	37.97%
Attivo Investments Apex Accumulation Growth	25.37%	30.67%	70.96%

Data Source: SEI

Performance data from 31/12/2019 to 30/11/2024 is calculated using a simulated track record provided by SEI Global Investment Management Limited. Simulated performance consists of actual fund tracker record and simulated fund track record. The data shown relates to simulated past performance. Simulated past performance is not a reliable indicator of future results. This simulation does not represent SEI's ability within the underlying funds to make decisions on which positions to include. There is no guarantee this algorithm will be successful in the future or that the same algorithm would have been used if all the funds was actually being managed at the time. More information about the simulation is available upon request.