This guide is designed to provide a brief introduction on how Australian Standfirst fully serves a family’s particular needs and investment goals and we hope this guide adds insight and clarity on some of the most common questions asked.

We, at all times, respect the boundaries between professional advice and personal affairs and throughout every engagement, prioritise privacy and discretion, before all else.

Recognising that the vast majority of our existing clients and future prospects already enjoy existing relationships with numerous intermediaries and sources of advice and we therefore aim to augment this dynamic by contributing our very specialised service, which is designed to work independently but can easily be coordinated with others.

Our total commitment focuses on providing forward looking and strategic investment advice that is calibrated to protect existing assets, enhance wealth and lessen the risk and uncertainty faced by our clients in this increasingly complex world.

We specialise in providing this advice solely to individual wholesale clients as well as select family groups whilst operating with the utmost discretion.

One of our specific areas of deep experience is in supplementing Private (PAF) and Public (PuAF) Ancillary Fund remits and we greatly enjoy working alongside other important stakeholders, such as Accountants and Trustees who administer Charitable Trusts and Estates to further enable a family’s own philanthropic goals.

Our techniques also endeavour to solve the problems others ignore by employing truly agnostic quantitative and qualitative methods throughout all of our client engagements.

To further serve such engagements, the Australian Standfirst Family has built patiently and with purpose, a capacity-constrained Global Core Fund Series, honouring the familiar touchpoints of original and thoughtful investment management, supported by an established leadership position, persistent track record and dedicated commitment to Australian Ultra High Net Worth (UHNW) and Philanthropic wealth management solutions.
ENRICO HEMINOWAY believed bullfighting was unique, made all the more compelling by the fact that no matter how much risk was involved, the degree of brilliance in the performance depended solely on the matador’s focus, honour and courage.

In the past and at their best, active fund managers displayed their brilliance to Australians when their original and thoughtful investment approaches led directly to bull’s eye performances.

Then the world and finance with it changed and the fighting bulls redefined risk as a choice between financial performance and responsible investing, impeding those who dared pursue both.

Already stuck on the horns of a dilemma, many investors felt further cornered by Aligned Australian Financial Oligopolistic Conglomerates who chased those with brilliance and bull’s eye performances out of the pen with what we now know to be soulless mechanical bulls.

Some found refuge in the nascent rise of passive alternatives such as Exchange Traded Funds, or ETF’s, which have become an impressive addition to global investing and although not a shelter from the loss of a bull or the clawing from a bear, have allowed those who wish to ride with the herd to join the bull-pack in very cost effective ways.

But for many, Heminoway’s insight not only spoke to degrees of performance but of risk and responsibility in the face of any adversity and for these investors, standing one’s ground demands a compelling and actively managed risk-first approach.

Built patiently and with purpose for such exciting clients, Australian Standfirst now enters this building with its Global Core Fund Series, championing the familiar touchpoints of original and thoughtful investment management, supported by an established leadership position, persistent track record and dedicated commitment to Australian Ultra High Net Worth (UHNW) and philanthropic wealth management solutions.

Similar to the evolving social contract between us, our planet and even matadors since the time of Heminoway, an elevated but still practical approach to Responsible Investing today demands that Environmental, Social and Governance (ESG) ideals are no longer niceties but are imperatives from now on.

In a step forward, Australian Standfirst is the first active fund manager to integrate ESG into our benchmark, which will publicly hold us to account and elevate ESG as an enticible performance requirement.

Announcing the S&P Global LargeMidCap Ex-Australia and New Zealand ESG and Green Bond TR 70/30 Monthly Blend Index.

The S&P Blend Index utilizes an ESG scoring methodology, overseen by S&P Dow Jones, governance groups and calculated by S&P Dow Jones Indices, recognised since 1995, as the preeminent global investment specialist focused exclusively on sustainable investing.

Responsible Investing is further optimised throughout our global macroeconomic top-to-bottom process and places Responsible Investing equally alongside thoughtful due diligence, risk-first deep research and tactically proactive prescient investing.

To simplify your global investing and reconnect with what matters to you as a responsible investor, grab the bull by the horns and visit us at

australianstandfirst.com

and email
express.interest@australianstandfirst.com
to explore how you may also enter this arena.
For Australian Ultra High Net Worth investors there’s an ever-present need to modulate the amount of accepted risk and wariness surrounding the likelihood of an erumpent in contagion.

For us this mean modulating the amount of risk in our fund is probably the most important task we undertake daily – we like the world but were not overreaching for risk.

In the past and at our best, realising ‘Intrinsic’ Value takes time. We have found that on a trailing 10-year basis, funds with low portfolio turnover (less than 25% per year) have beaten both their benchmarks and higher turnover peers.

Our three guiding Portfolio Management Principles therefore are, (1.) Do not take single party counterparty risk – we always face the exchanges or regulated markets, (2.) Avoid conditional correlations, they mean nothing positive in a crash and (3.) Secure your base, as, afterall, “offence wins games and defence wins championships.”

The investment staff provide an undertaking to only invest in Australian Standfirst funds in the future. At Australian Standfirst we are aligned with our investors long term investment goals because we are managing our wealth alongside our investors.
In our view, uncertainty is the enemy of growth and to approach our systemic quantitative determination, the Australian Standfirst DDPM team has developed a proprietary top-down determination filter, we call our Core Activity Indicators (“CAI’s”).

A qualification and veto process that is completed before optimising portfolio construction, the CAI’s provide our DDPM team a strong framework of rules to manage optimal portfolio returns, minimises risk characteristics and satisfy liquidity requirements, at any given dynamic market moment. Importantly, Responsible Investing (“RI”), is further optimised throughout our global macroeconomic top-to-bottom process and places RI equally alongside thoughtful due diligence, deep risk-first research and tactically proactive prescient investing. The Fund places a strong focus on displaying resilience in down markets, as protecting capital is Australian Standfirst’s first priority, especially as investing does not follow a glide path of uninterrupted success.

Global Macro funds can earn a premium for taking on risks. These can be either: 1. Easily accessible systematic risks derived from directional market exposures (Beta), 2. Alternative systematic risks, which require skill to access (Carry) or, 3. Exploit an advantage over other participants in the financial markets (Alpha).

Since none of these three sources of returns satisfy all the portfolio objectives on their own, the portfolio should include each.
Meet a sample of the Due Diligence and Portfolio Management (DDPM) Team

Innes Willox  
Chair, Australian Standfirst Board

Patrick Broughan  
Deputy Chair, Australian Standfirst Board

Rachel Cooper  
Communications, Ex Officio, Australian Standfirst Funds Management Limited

Hayden Matthews  
Investment Committee Member

Nader Naeimi  
Investment Committee Member

Eran Reinisch  
Investment Committee Member

Dr. Peter Zeitsch  
Quantitative Modelling, Australian Standfirst

Kwame Owusu  
DTR, Australian Standfirst Asset Management

Stirling Larkin  
CIO, Australian Standfirst Asset Management

When meeting members of the Australian Standfirst Family, you will notice that they all share one very important vision – to simplify global investing by empowering Australians with clear financial, investor and philanthropic education and investment solutions.

The Family encompasses approximately 300 people, ranging from Executive to Ambassadorial and it does not rely upon any one person, or group of people but rather functions collectively to serve Australians.

The Due Diligence & Portfolio Management (“DDPM”) team is the spear point that realises probabilistic insights into deterministic implementations for the Global Core Fund Series.

The establishment of the DDPM team was an important step towards driving the business and as importantly, culture, in the right direction. The constitution of this team is set to enhance important areas of commercial focus for the fund, such as tax (domestic and foreign), corporate and industry sector engagement and specialists risk management. It will also be commensurate with the brand profile, desired client audience and professional best standards.