

**GIVING YOUR
PORTFOLIO
THE EDGE**



Genuine Edge

THE FIVE THEMATICS

1. Source: <https://www.worldometers.info/world-population/india-population/>

2. Is South Asia Ready for Take Off? : A Sustainable and Inclusive Growth Agenda, Manuela Goretti, Daisaku Kihara, Ranil M Salgado and Anne Marie Gulde, November 2019

3. Why global small-cap stocks are becoming an important part of institutional portfolios, Raina Oberoi, MSCI, Mar 2017

4. Source: <https://www.pwc.com/gx/en/industries/healthcare/emerging-trends-pwc-healthcare.html>



What is GenuineEdge

Designed for younger investors with a longer timeframe or high net-worth individuals seeking enhanced returns through higher-risk opportunities in part of their portfolio.

The GenuineEdge Portfolio targets major themes with strong long-term growth potential by investing in the 'edges' most likely to outperform over the next 10 to 20 years. It's a distinct offering for those investing in the future and investing for a future.

20%

Indian shares

Large population and relatively young demo-graphic to drive growth across different sectors with existing and emerging opportunities. India ranks no.2 in the list of countries by population¹ and is set to play an increasing role in the world economy with continuous efforts for reforms to support sustainable growth².

20%

Global small companies

Global smaller companies have been found to exhibit more attractive risk-return characteristics than their large-cap counterparts and are likely to offer additional diversification to an investor's investment portfolio³. Small-cap companies are normally more focused on specific products or services within a niche market, which are likely to expand faster with the potential of longer periods of compounding growth.

20%

Global health care

The healthcare sector will continue to be at the forefront of research and development amid rising demand from a larger middle-class demo-graphic, bigger aging population and longer life expectancy⁴. From mobile wellness and fitness technologies to advancements in disease detection and treatment, healthcare remains an essential theme of a better future.

20%

Robotics and artificial intelligence

Robotics, AI and automation have developed dramatically with increasing focus on driving efficiency and productivity into many new areas that will have a profound effect on our lives. From cloud-based service to 3D-printing or near-real-time translation, the market has seen many 'disruptors' expand rapidly with resilient profit growth. Companies that are the true pioneers of the industry will continue to invest and to innovate, creating new opportunities for investors to take part in these changes that are or will be the trends in the future.

20%

Global tech companies

As technology continues to evolve at an unprecedented pace, global technology companies offer significant growth potential as they are at the forefront of innovation, driving advancements in areas such as cloud computing, cybersecurity, and digital transformation. It also includes companies that are pivotal in the digital economy, enhancing connectivity, and enabling new business models across various industries. A focus on global technology companies provides exposure to cutting-edge technologies that are shaping the future, ensuring diversified growth opportunities.

Key benefits

Giving you the edge to achieve financial success.

Competitive pricing

Cost-effective, competitively priced solutions designed to help investors achieve greater returns.

Broad exposure

Easy access to a broad range of companies across sizes, sectors, and global regions.

Active overlay

A sophisticated traffic light management approach designed to reduce volatility for your portfolio.

GenuineEdge

Thorough research

Strict selection criteria to identify themes with strong return potential and to screen for investments that align with our beliefs and follow a robust investment process.

In-depth expertise

Experienced investment professionals continuously monitor portfolio construction and rebalancing to ensure performance remains on track.



www.carephilosophy.com.au

 L11, 45 Clarence st, Sydney NSW 2000

 +61 2 8074 8599

 info@carephilosophy.com.au

DWA Managed Accounts Pty Ltd is the investment manager of CAREphilosophy. The information contained in this report has been provided as general advice only. The contents have been prepared without taking account of your personal objectives, financial situation or needs. You should, before you make any decision regarding any information, strategies or products mentioned in this report, consult your own financial advisor to consider whether that is appropriate having regard to your own objectives, financial situation and needs. Investment markets past performance are not necessarily indicative of future performance. Whilst DWA Managed Accounts Pty Ltd is of the view the contents of this report are based on information which is believed to be reliable, its accuracy and completeness are not guaranteed and no warranty of accuracy or reliability is given or implied and no responsibility for any loss or damage arising in any way for any representation, act or omission is accepted by DWA Managed Accounts Pty Ltd and its affiliated entities or any officer, agent or employee of DWA Managed Accounts Pty Ltd and its affiliated entities.

DWA Managed Accounts Pty Ltd – ABN 89 104 065 250 | AFSL 264125