

## Lonsec's Unlisted Research Package for New Zealand

Expanding on Lonsec's comprehensive research coverage in Australia, we now offer in-depth qualitative research on several New Zealand domiciled fund managers, along with full research on over 120 products available under the Mutual Recognition of Securities Offering (MRSO). In addition you will also have access to our strategic asset allocation framework, designed specifically for New Zealand advisers to use with their clients.

Our research reports are formally reviewed on an annual basis, with quarterly updates and monthly performance reporting. The research is provided through our website portal and is accessible through your own individual login, available all day, every day.

Lonsec's unlisted investment research is undertaken by experienced in-house analysts, and our research teams work in a collaborative, open plan environment that promotes discussion between teams and the sharing of ideas and information, an arrangement that sets Lonsec apart from its competitors.

### **What does a subscription to Lonsec's Unlisted New Zealand Research include?**

- ∅ The Lonsec Recommended List, our ratings of more than 850 managed funds, including New Zealand domiciled managers
- ∅ Ability to search for funds listed under MRSO, of which 120 funds are rated by Lonsec
- ∅ Annual Fund Reviews for all Lonsec researched products
- ∅ Quarterly Fund Updates for all Lonsec researched products
- ∅ Monthly Fund Profiles for more than 10,000 investment products
- ∅ Annual Sector Reviews
- ∅ Australian Natural Resources, Property & Infrastructure and Debt & Structured Product Research, including recommended lists, comprehensive research reports, and a range of industry-specific reports and analysis
- ∅ A range of publications including the *Month in Review*, the *Quarterly Outlook*, *Investment Perspectives* and our quarterly e-newsletter, *Latitude*
- ∅ Daily Research Bulletin, an email outlining rating updates and providing a market wrap.

To ensure you have the complete picture about your clients' investments, as well as a valuable source of qualitative research information, subscribe to Lonsec today.

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### Current research coverage

SECTOR /SUB-SECTOR	FUNDS
<b>Funds covered under the Mutual Recognition (MRSO)</b>	<b>120+</b>
New Zealand-domiciled managers	~10
Global equities – large cap, small cap, SRI, long/short, sector, regional, geared, emerging markets and resources	87
Australian equities – large cap, small cap, SRI, long/short, concentrated, geared, income focused, index and resources	99
Diversified – defensive, capital stable, balanced, growth and high growth	39
Fixed interest – alternative income, alternative income (high), diversified, global, mortgage, mortgage high yield	53
Infrastructure securities – Australian, global and hybrid	11
Property securities – Australian, global, hybrid	57
Structured products – open and closed ended	43
Natural Resources – MIS and managed funds	2
Multi-Manager – across a range of asset classes	152
Alternative investments – hedge funds of funds and single manager hedge funds	53
Direct property & infrastructure	50
Business & property projects	5
Australian and New Zealand direct equities	200+

### Rate the Raters

Lonsec's research team has consistently been well rated by fund managers in the annual 'Rate the Raters' survey published by one of Australia's premier financial publications *Money Management*. Among other measures, this survey rates researchers on the quality of their reports, depth of research and transparency of the research process. In 2010, this survey was extended to financial advisers for the first time. The combined results saw Lonsec awarded the inaugural 'Fund Ratings House of the Year 2010'

### Like to know more?

To trial our research, email your details to [info@lonsec.com.au](mailto:info@lonsec.com.au). Alternatively, you can contact us on 0800 452 294 to discuss how Lonsec's research can help support your financial advice.