



In the spotlight with Lonsec

Overview



In the Spotlight is Lonsec's new initiative that showcases a range of fund managers and products rated by Lonsec in a one-on-one interview style video. **In the Spotlight** aims to highlight the strengths of these fund managers and provide insight into their investment strategies and processes.

The Lonsec team will work with you to map out the interview so that you get to explain your approach to investing in detail, what you look for when assessing companies to include in your fund, as well as what makes your team high functioning. On the day of the recording, the production team guide you through the recording process to create high quality video output that can be used across all your media platforms and marketing campaigns.

In the Spotlight videos will also be distributed through Lonsec channels including our websites and award-winning platform iRate to maximise the reach to Australian financial advisers.

Lonsec is uniquely positioned within the Australian financial services industry and many leading advice practices looking to us to help them make better investment decisions. Partnering with us on **In the Spotlight** can help you reach this wider audience and amplify your brand in the market.

Please contact Tom Akay at tom.akay@lonsec.com.au or [0437418477](tel:0437418477) to communicate your interest.

Media Inclusion

Increase the reach for your brand!

Lonsec's video distribution channel

- ✓ Your 'In the Spotlight' video will be shown across Lonsec's extensive distribution channels. A native ad promoting the video on iRate, our investment research platform that reaches 4,800+ financial adviser and fund manager subscribers.
- ✓ 12-month display of your video on the In the Spotlight microsite ensuring additional exposure and engagement.
- ✓ Visibility will be boosted by featuring your video in the Lonsec Insights email bulletin, reaching over 25,000 industry participants.

Enhance your video's quality and impact

- ✓ Benefit from Lonsec's in-house expertise in video production to create a broadcast quality video that can be used across your own and external channels.
- ✓ Throughout the process, from initial planning meeting to final edit, the Lonsec team will work with you to ensure that you are happy with the final edit and distribution. We will work collaboratively with you to ensure that the video enhances your brand and message.

Track performance and harness success

- ✓ Stay informed with our comprehensive analytics, detailing the performance of your video. These invaluable insights will help you to make data-driven decisions, ensuring continued optimisation of your video.

About iRate®

iRate® is Lonsec's market leading investment research platform providing financial professionals with access to our full range of financial product research, ratings and analytical tools and will be one of the main distribution channels for your 'In the Spotlight' video.

Powered by one of Australia's largest investment research and consulting teams and providing an intuitive user experience, iRate® helps to deliver all financial advisers' investment research needs in one platform. With 4,500+ subscribers, iRate provides great reach for your fund and brand. Below is an example of how we can promote your In the Spotlight video and showcase your brand on iRate®.

The screenshot displays the iRate platform interface. At the top, there's a navigation bar with various links like 'Office 365', 'Bookmarks', 'Time Target', 'Novo IT Support', 'Login ResDiary - Re...', 'Login - Priava', 'Intranet', 'Old Email', 'Router', 'Microsoft Office Bu...', 'Imported', and 'Log in | Lonsec'. Below this, the main content area is divided into several sections:

- Latest Videos:** Features three video thumbnails. The first is '2023 ANNUAL SURVEY' by Super Ratings, a Lonsec Company. The second is 'Helping you make better decisions for your practice and clients' by John Burton. The third is 'Lonsec Retirement Managed Portfolios - Q1, 2023' and 'Lonsec Sustainable Managed Portfolios - Q1, 2023'.
- Latest News:** Displays three news articles. The first is about a corporate bond renaissance. The second is 'Insights from our CIO: Keeping it in perspective' by Global equities. The third is 'Money Management 35th Annual Fund Manager of the Year Awards 2023 - Winners Announced'.
- Lonsec Events:** A calendar view for July 2023, showing various events and webinars.
- Featured Video:** A large promotional banner for 'IN THE SPOTLIGHT WITH Lonsec' by Pzena Investment Management. It features a video thumbnail and a 'WATCH THE VIDEO HERE' button.

Deliverables



Timeline

- Phase 1 - Planning and briefing meeting with Lonsec and your firm
- Phase 2 - Filming on site (either in Melbourne or Sydney)
- Phase 3 - Editing of video
- Phase 4 - Lonsec to circulate draft video to Fund Managers and Team
- Phase 5 - Approval from fund manager and Lonsec Compliance and Legal
- Phase 6 - Final version distributed through agreed channels