



Select Equities is an independent
Australian investment and advisory firm



Select Equities Capabilities

- 70+ years combined securities market experience
- 2,000+ clients
- \$350m+ transactions pa
- \$50m-\$100m assets under sponsorship
- \$10m+ funds under advice
- Clearing and settlement services supplied by AA rated banks



Select Equities provides securities advice and dealing services to:

- Institutional Investors
- Corporate Entities
- Private Investors
- Financial Intermediaries – Planners & Accountants



Institutional Investor Services

- Select Equities provides expert securities advice and dealing services to institutional investors
- All Ordinaries Focus
- Recommendations based on conservative & long-term wealth creation strategies
- We use proprietary stock research techniques & processes, based on:
 - ✓ top-down analysis and
 - ✓ bottom-up stock research



Institutional Investor Services Include:

- Stock research
- Dealing and execution services
- Arranging access to company management
- Providing access to lines of stock
- Providing access to small cap corporate product
- IOS straight through functionality



Corporate Entities

- Select Equities provides expert securities advice and dealing services to corporate entities
- Capital raisings – IPOs and placements
- Underwriting
- Director dealings
- Employee share plans



Private Investor Services

- Select Equities provides expert securities advice and dealing services to select private clients
- Clients include private investors & DIY superannuation funds
- Direct Share Focus
- Clients benefit from our intellectual property
- Our investment advisory service is called **Select ProActive**



The goal of **Select ProActive**, our investment advisory service, is to help our clients increase their net wealth by investing in quality Australian companies and securities with a long term view.

Select Equities bases its advice on stock research undertaken by the firm. **Select Equities** stock research includes quality, outlook, valuation and risk filters.



Stock Selection We look for stocks that possess one or more of the following characteristics:

**Recorded better than
GDP growth
compounded over a 5 year
period**

**Possess a leading
market position**

**Possess
pricing power**

**Possess quality
management**

**Possess a quality
balance sheet**



Daily Stock Research & Monitoring Techniques Include:

**Reading
Financial Press**

**Reading
Company Reports**

**Analysing
Market Data**

**Identifying
Trends**

**Reading
Broker Research**



Financial Intermediaries

- Select Equities provides expert securities advice and dealing services to select financial intermediaries
- Expert and timely portfolio reviews and recommendations
- Market leading order execution



Our Team

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