

BITESIZE

PORTFOLIO ADVISORY INSIGHTS

MAY 2021



WHY THE LONG TERM MATTERS

We believe asset allocation and diversification drive long-term returns. This means a **Strategic Asset Allocation (SAA)** is critical.

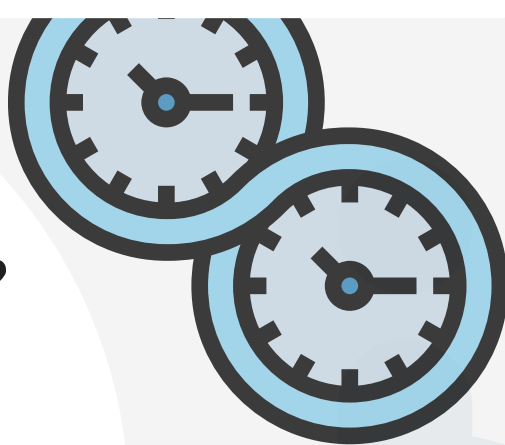
HOW SHOULD I MANAGE THE LONG-TERM?

A good SAA will focus on asset allocation.
A great SAA will provide **implementation, review**
and **exposure weight guidance**.

WHEN SHOULD I MANAGE THE LONG-TERM?

The SAA should be reviewed **regularly**.

The outlook for lower cash returns means strategies that were appropriate 18 months ago may not be appropriate now.



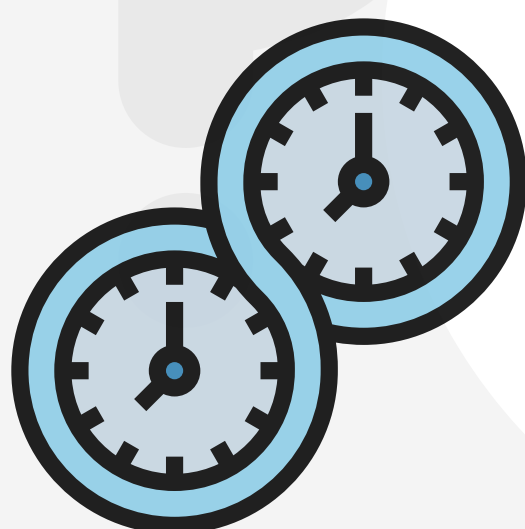
WHO CAN HELP?

Building and reviewing an SAA is not easy.

The **Portfolio Advisory Service** has deep expertise in asset allocation and manager selection.

We are working with clients to build bespoke SAAs that will stand the test of time.

Get in touch for more information.



Curated by **Dr. Isaac Poole, CIMA®**

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Isaac is the Global Chief Investment Officer and Portfolio Manager for **Oreana Financial Services**. With experience across investment strategy, portfolio and risk management, research and central banking in Asia, the UK and Australia, he leads the team in monitoring economic and market outlooks.



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