



PRESENTED BY
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Innovation and Investment Insights Præmium Update



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Market size & growth opportunity



One platform – all clients, managed accounts & investments – regardless of advice business model



- » 635,000 HNW investors
- » Controlling \$3tn in investable assets



- » HNWs seeking sophisticated investment solutions with access to alternative assets



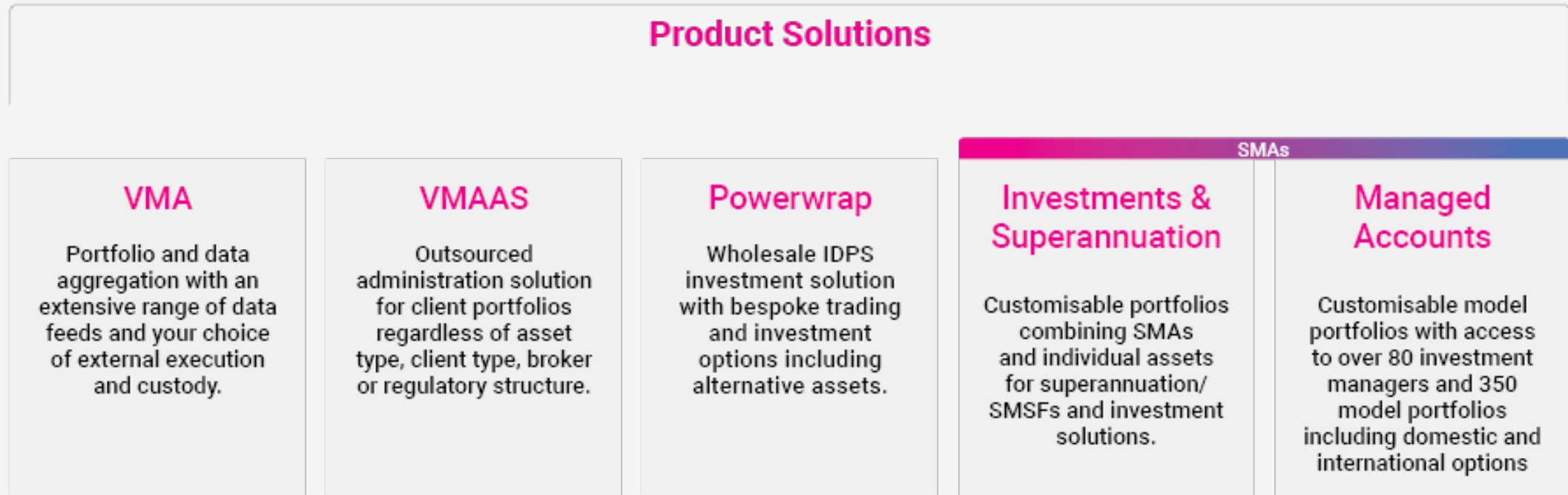
- » Mass affluent seeking diversified investment options with superannuation solution



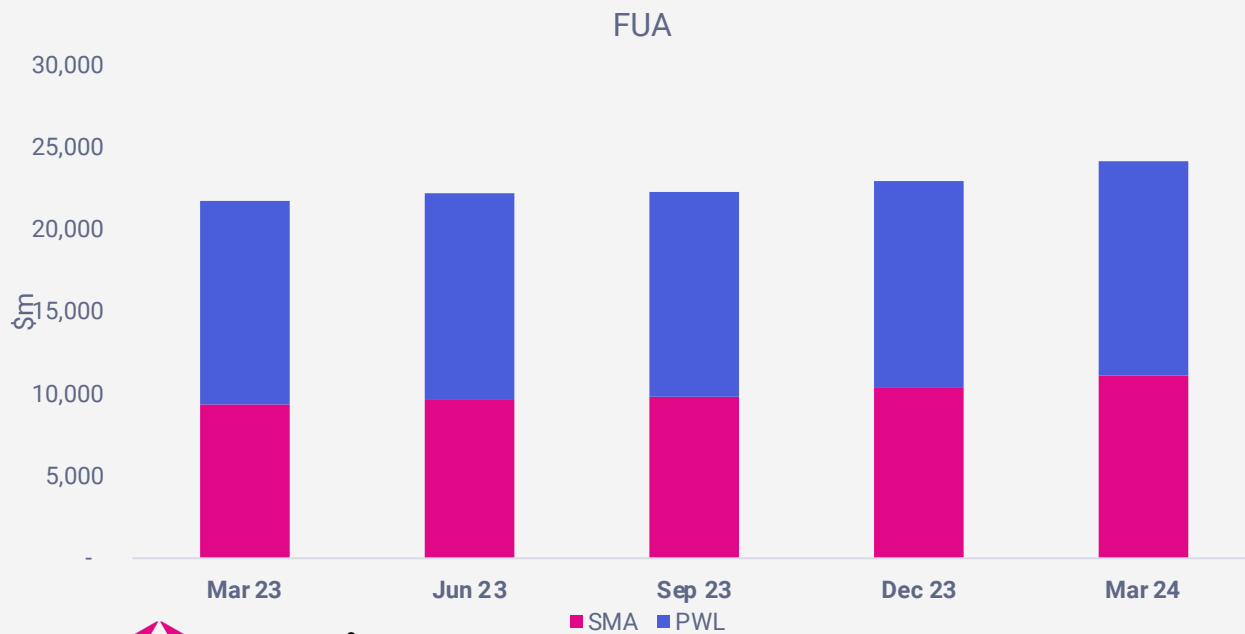
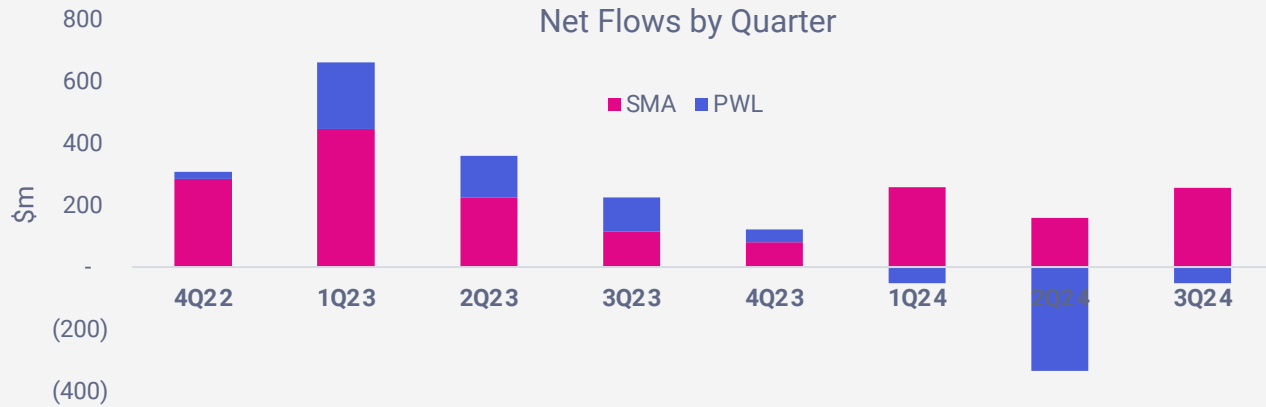
- » \$3tn intergenerational wealth transfer creating new generation of investors

Praemium product solutions

Unlimited flexibility to tailor an advice strategy.
One platform for every client, every investment and every type of advice business.



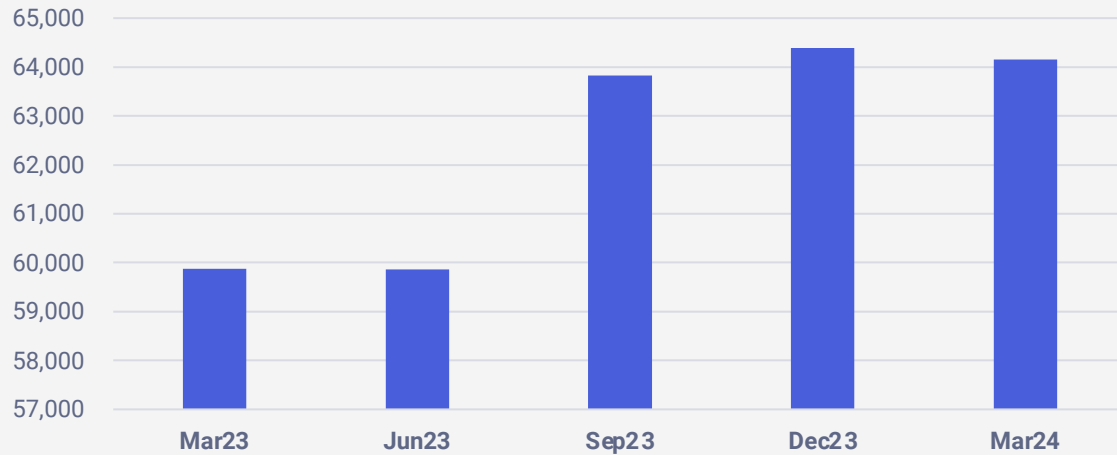
Custody investment



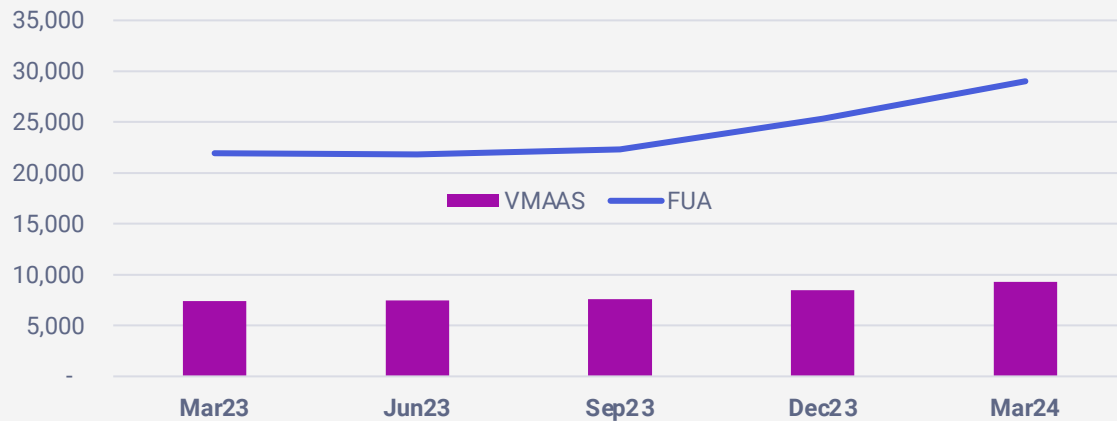
- » FUA \$53.3b - up 22% vs March 23
- » Addition of \$4.1b OneVue FUA in April brings total to \$57.4b
- » Platform FUA \$24.3b – up 22%
 - » Total SMA \$11.2b - up 19%
 - » Powerwrap \$13.0b – up 5%

Non-custody services

VMA Services (\$m)



VMAAS Service and FUA (\$m)

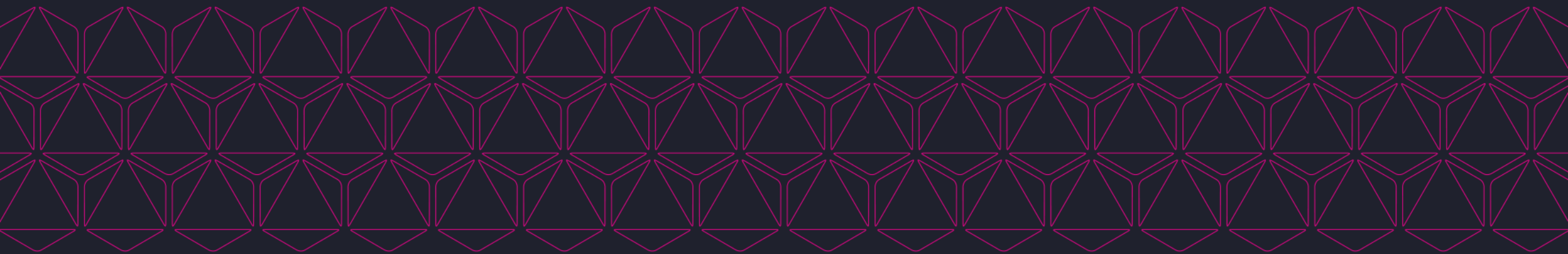


- » Reinvigorated growth in non-custodial services with 36 new client firms ytd
 - » VMA 64,149, up from 59,880
 - » VMAAS 9,267, up from 7,397
 - » VMAAS FUA \$29.0b - up 32%
- All comparisons v March 23

» Clear market leader

» Platform cross-selling opportunities being realised

Questions





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