



# Media release

## SSgA launches ETF model portfolio offering with OneVue

October 16, 2013

State Street Global Advisors (SSgA) and OneVue today announced that SSgA is launching a suite of six exchange traded fund (ETF) model portfolios via OneVue's Unified Managed Account investment platform for advisers and their clients.

The suite will comprise five risk-based models, ranging from high growth to conservative, and a flexible asset allocation model that incorporates a cash-plus approach with a focus on capital preservation when volatility occurs.

Mark Wills, head of SSgA Investment Solutions Group for Asia Pacific ex Japan, said: "Tactical asset allocation is increasingly gaining traction in Australia, which in turn is fuelling retail investor appetite for model portfolios that employ tactical asset allocation.

"SSgA has more than 20 years of experience designing asset allocation strategies for institutional investors. We build customised investment portfolios based on specific objectives for many of the world's biggest institutions. With this new ETF model portfolio approach we are able to give retail investors access to this asset allocation expertise, implemented in a cost-effective, transparent way using ETFs."

OneVue head of partner solutions Brett Marsh said having formed a strategic partnership with an ETF issuer as experienced as SSgA was a particularly pleasing feat for OneVue.

"SSgA created the first ETF globally, the first ETF domestically and currently holds the biggest share of the ETF market in Australia," Marsh said.

"This partnership enables OneVue's client base to leverage SSgA's global and domestic expertise and capabilities in asset allocation, and gives clients access to model portfolios comprised of SPDR® ETFs in addition to ETFs offered by other leading issuers."

The suite of Australian-listed ETF model portfolios are tailored specifically for OneVue by SSgA and offer exposure to cash, domestic fixed income, domestic equities, international equities and alternatives. SSgA will advise on the asset allocation for the models, regularly reviewing the strategic allocation to ensure alignment to the stated objectives, while dynamically shifting allocations in response to significant market events. The exposure to each asset class is implemented via exchange traded products, including SSgA's range of SPDR ETFs.

Mr Marsh continued: "In the near future these models will also become available on OneVue's wealth management portal for organisations that cater to the self-directed market and will be an easy way for investors to diversify their portfolio in a flexible, tax effective and low cost manner," Marsh said.

"We recognise that the adoption of ETFs continues to increase both in the advice and self-directed sectors, with the exchange traded product market reaching a record \$8.8 billion in assets, according to the latest ASX Funds Monthly Update.

"ETFs provide an entry point to sectors that are more difficult to access in the Australian marketplace, for instance international markets, and they offer greater transparency as it's possible to know precisely which securities the ETF holds daily."

Marsh added that the addition of this suite on OneVue's menu means advisers can tap into the skill set of qualified investment managers, while at the same time removing the challenge for direct investors in terms of what companies to pick, how they go about doing it and ways they can get exposure to different asset classes.

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## **About State Street Global Advisors**

State Street Global Advisors (SSgA) is a global leader in asset management. The firm is relied on by sophisticated investors worldwide for its disciplined investment process, powerful global investment platform and access to every major asset class, capitalisation range and style. SSgA is the asset management business of State Street Corporation, one of the world's leading providers of financial services to institutional investors.

## **About OneVue**

OneVue is an independent, privately owned, financial services business based in Australia. Today OneVue's key areas of focus comprise four business verticals: An online investment platform for financial advisers; SMSF services for financial advisers and accountants; A wealth management portal for self-directed investors; Unit registry services and installed software for financial institutions.

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## Disclaimer

Asset Allocation is a method of diversification which positions assets among major investment categories. Asset Allocation may be used in an effort to manage risk and enhance returns. It does not, however, guarantee a profit or protect against loss.

CORP-0875