Nucleus Wealth is an investment manager and technology provider. We believe the best financial advice in future years will be a fusion between advanced digital tools and adviser know-how. We are looking forward to being at the forefront of these changes.

Proton, Nucleus Wealth's class leading digital experience, gives advisers the chance to cost-effectively service the low balance market, and build relationships with clients from the very beginning of their journey. Allowing you to grow with your clients as their financial advice needs develop.

Proton offers:

- A robust online experience that can deliver personal investment advice (via SOA) instantly
- A thorough online onboarding experience that provides personal investment advice and ID verification. Allowing you to speed up onboarding and cut down administration.
- Seamless integration with any CRM, platform or system that uses Zapier APIs.

And when combined with the Nucleus Wealth portfolios **Proton** also offers:

- Customised ethical tailoring - with over 30 ethical themes to choose from
- Dynamic risk portfolios of individual shares, personalised to your client's needs
- Full transparency over all holdings using SMAs
- An investment team with more than 100 years of experience
- Liquid, safe assets, held directly in the client's name by JPMorgan and HSBC
- Range of account types including personal super
- Minimum investment size of $10,000

Get in touch to discuss with our team the best way to tailor our system to the needs of your practice.

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Next Generation Investments

Nucleus Wealth is a multi-asset, international fund manager that combines the benefits of an active fund manager with the low-cost advantage of passive funds, and offers the ability for you to customise your clients' investments to suit their ethical, risk and income needs.

Actively managed, tactical asset allocation & stock selection - 80 to 100 holding portfolio:

(All portfolio figures are since inception date of 31st July 2017)

Growth

7.9% pa
(5.3% capital v 2.6% income)
Volatility 6.0%
(56% lower than equities)

Accumulation

4.4% pa
(2.1% capital v 2.3% income)
Volatility 3.1%
(78% lower than equities)

Income

4.1% pa
(1.6% capital v 2.4% income)
Volatility 2.8%
(80% lower than equities)

Full equity portfolios with a focus on quality and value:

Core International

60-80 direct international holdings
14.2% pa
(11.5% capital v 2.7% income)
Sharpe Ratio - 1.06 (vs 0.78 for index)
Beta - 0.76
Volatility 15% lower than the index

Core Australia

20-40 holdings
6.2% pa
(2.6% capital v 3.6% income)
Sharpe Ratio - 0.41 (vs 0.39 for index)
Beta - 0.79
Volatility 25% lower than the index

A passive, large-cap solution that retains full ethical customisation:

Global Leaders

35-45 holdings
Min investment: $50,000
Benchmark: S&P100

Australian Leaders

23-27 holdings
Min investment: $15,000
Benchmark: ASX200

Government Bond Ladder

10-15 holdings
Min investment: $20,000
Benchmark: Bloomberg AusBond Treasury Index

- Diversified, low volatility, blue-chip solution that you can tailor for your client's ethical and portfolio preferences.
- Broad range of preset and client-specific ethical and portfolio screens can be applied to all models seamlessly through the platform.
- Allows you to exclude fossil fuels, but not gambling, if your client prefers. Or vice versa. Or limit exposure to the Australian housing market if your client has direct exposure already.
- 4 Star Superior rating from SQM. Available upon request.
- Currently available on Praemium, looking to add to Netwealth and Hub24.
- Easy and quick onboarding through the Nucleus Wealth portal or Praemium.

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