

salita
PORTFOLIO SERVICES

At Salita, we deliver quality portfolio construction services designed exclusively for financial advisers.

We're also advisers at heart. Our team averages more than 25 years in the industry — and every member has worked within advice networks and practices.

Discover a portfolio partner, built around you.



> Salita means "ascent" or "rise" in several languages. It reflects our purpose: to help advisers and their clients' investments reach new heights — in capability, confidence, and outcomes.

Every portfolio, process, and point of contact is built to integrate seamlessly with your advice model.

Who we are:

Built for advisers:
We founded Salita with one purpose — to give advisers a portfolio management partner that truly understands their world.

Powerful partnerships:
Salita is backed by Entireti, who support approximately 1600 advisers across Australia.

We're also in partnership with leading research providers and global investment managers through Lonsec Investment Solutions, together with BlackRock and Franklin Templeton. Together, we deliver world-class insights and value at scale.

What Makes Us Different:

Client focused, adviser-led:
We deliver a complete, end-to-end adviser solution to make portfolio management simpler, more effective, and more valuable to your clients.

Always on. Always accessible:
Salita isn't a "set-and-forget" manager. Advisers have direct access to our CIO, analysts, and insights, ensuring the right expertise is always available.

Value active management:
We strike a unique balance: the quality and conviction of active portfolio management, combined with our efficiencies of scale, smart construction, and strong partnerships.

Learn more about our expert team at salitaportfolioservices.com.au

Our Portfolio Suite

Your clients' goals are rarely one-size-fits-all; neither are our solutions.

The G Series

Accumulation

For clients in a portfolio growth phase, we offer six diversified, active portfolios aligned to distinct risk profiles and long-term goals.

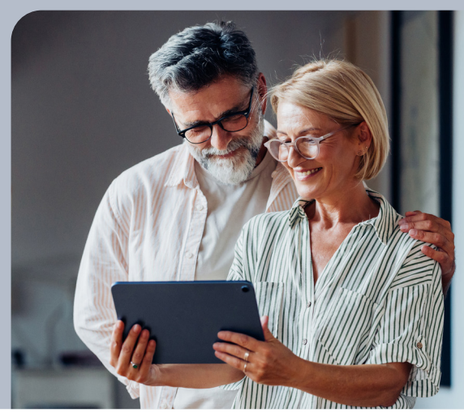
Flexible by design, these portfolios can serve as a complete solution or act as the core component within a broader investment strategy.



Retiree

Our three retiree-focused portfolios are designed for clients who need dependable income and capital preservation.

Each is actively managed to deliver sustainable withdrawals while still meeting CPI+ objectives, tailored for time horizons of 3–7 years.



Direct Equities Portfolio

For clients seeking a more concentrated equity allocation we manage a high-conviction Australian equities portfolio holding 15–20 positions within the S&P/ASX 100.



Tailored Portfolios

Bring your investment philosophy to life

For practices seeking something truly bespoke, we design and manage private-label portfolios. Each solution is aligned to your unique investment beliefs, powered by our research, governance, and execution framework.



At Salita Portfolio Services, our approach to portfolio construction is driven by the following investment principles:

Growing and preserving capital

Our overarching goal is to grow investor wealth over time whilst minimising the risk of permanent capital loss. Whilst negative returns may be experienced over various time periods our focus is to minimise drawdowns and preserve capital over the medium to long term.

An intelligent approach to asset allocation

Our starting point is the Strategic Asset Allocation (SAA) aligned to the G Series Portfolios. The SAA is built around medium to long term capital market assumptions and is reviewed annually to ensure consistency with overall portfolio objectives. We believe that timing the market is difficult and therefore we do not intend to take a short-term tactical asset allocation approach. Rather we interrogate the SAA on a regular basis to determine if changes are warranted to support a high conviction medium term view.

Managing turnover

Consistent with our longer-term approach we aim to keep turnover within the portfolio to a minimum. Part of this approach is to ensure we measure investment products over the appropriate time horizon.

Active and passive investment strategies

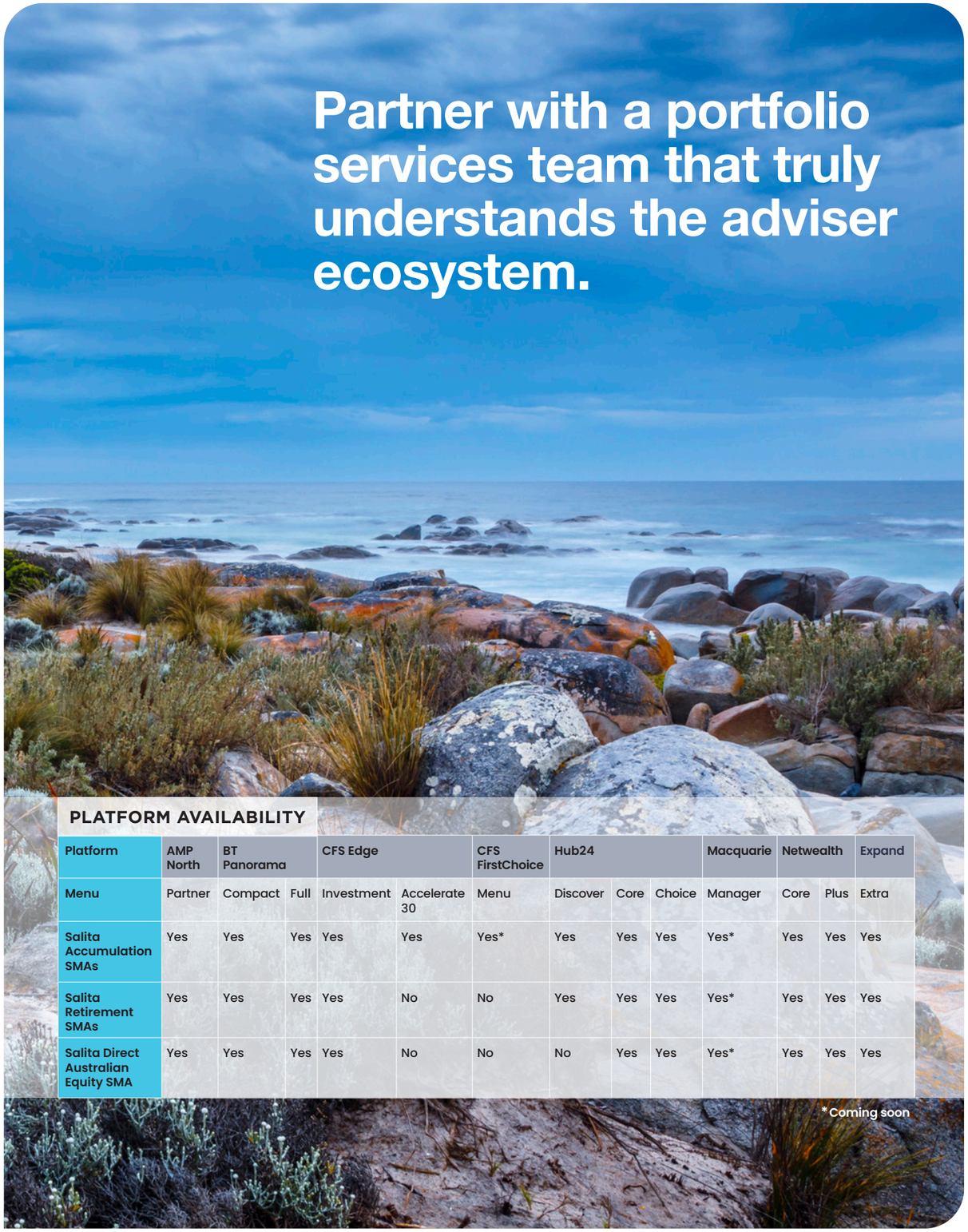
We assess the merits of active management across each asset class and will use active management where we have strong conviction that it will lead to a superior outcome, either via outperformance and/or lowering drawdown risk. Typically, this results in a blend of active and passive investment strategies in portfolios.

A focus on fees

Assessing the level and appropriateness of fees, both at the individual investment product and overall portfolio level is an important feature of our approach. Lower fees are the preference but paying an appropriate fee to gain access to superior investment skills is also worthy of consideration.

Diversification

We believe that diversification is an effective way to manage risk. Investing across different styles allows portfolios to be less volatile and have more predictable outcomes and enables portfolios to perform through varied market conditions without being wholly reliant on a particular style (i.e. Growth or Value) being in favour.



Partner with a portfolio services team that truly understands the adviser ecosystem.

PLATFORM AVAILABILITY

Platform	AMP North	BT Panorama		CFS Edge		CFS FirstChoice	Hub24			Macquarie	Netwealth		Expand
Menu	Partner	Compact	Full	Investment	Accelerate 30	Menu	Discover	Core	Choice	Manager	Core	Plus	Extra
Salita Accumulation SMAs	Yes	Yes	Yes	Yes	Yes	Yes*	Yes	Yes	Yes	Yes*	Yes	Yes	Yes
Salita Retirement SMAs	Yes	Yes	Yes	Yes	No	No	Yes	Yes	Yes	Yes*	Yes	Yes	Yes
Salita Direct Australian Equity SMA	Yes	Yes	Yes	Yes	No	No	No	Yes	Yes	Yes*	Yes	Yes	Yes

* Coming soon

Start a conversation with Salita.

Partner with a portfolio services team that truly understands the adviser ecosystem and discover a portfolio partner — shaped for your clients.

To find out more about the Salita portfolios or to arrange a discussion for your practice, please contact:



Sarah McCarthy
Head of Portfolio Solutions

e. smccarthy@entireti.com.au
t. 0421 598 275



Natara Evans
Senior Manager. Portfolio Solutions

e. nevans@entireti.com.au
t. 0439 763 156

Important Information: Salita Portfolio Services Pty Ltd is a corporate authorised representative of Personal Financial Services Ltd AFSL 232706 ("Licensee"). This document has been prepared for general information purposes only and does not take into account the specific objectives, financial situation, legal circumstances, or needs of any individual or organisation. The information contained in this document is not intended to constitute legal, financial, or other professional advice and should not be relied upon as such. Before making any decision or taking any action based on the contents of this report, you should consider its appropriateness to your circumstances and seek independent professional advice. Any references to past performance are provided for illustrative purposes only and are not a reliable indicator of future performance. No representation is made that any outcomes or results will be achieved in the future. To the maximum extent permitted by law, Salita Portfolio Services and the Licensee disclaim all liability for any loss or damage (including indirect or consequential loss) arising from reliance on the information contained in this report or from any error or omission.