

Approved Product List



Version	8.4
Status	Final
Issue Date	July 2022

This is the Approved Product List that Authorised Representatives of Insight Investment Partners may use without having to seek approval from the Investment Committee or Responsible Manager.

It remains the Authorised Representatives responsibility to ensure that if any of the assets on this list are recommended (Buy, Hold , Sell or Reduce) to a client they are appropriate to their needs, objectives and circumstances and are in the client's best interest.

Funds that are outside of this list may be recommended if they are in the client's best interest, their circumstances warrant the use of the fund and it meets their objectives. The Authorised Representatives record keeping must demonstrate the relevant research undertaken and the basis. In addition, the Authorised Representative must obtain one off approval from the Responsible Manager prior to recommending such assets to the client.

Applying for One Off Approval:

Applying for One Off Approval can be done via the iC2 Compliance App.

Product	Provider
Direct Australian Shares	<ul style="list-style-type: none"> • Held in Superannuation - All stocks inside the ASX 200 • Held outside Superannuation - All stocks inside the ASX 300 • Any authorised representative seeking to provide advice on a company outside of the above will require Off APL Approval from RM. <p>Morningstar Ratings: Generally, the investment should have at least a Morningstar Analyst Rating of '3 Stars' or higher.</p> <p>However, to receive one-off approval the Responsible Manager will not solely rely on this material as there may be circumstances where such Research is not available. Where the research is not available, the Authorised Representative must provide sufficient research to demonstrate it is in the client's best interest to purchase or hold a particular investment. https://arc2.morningstar.com.au/</p> <p>Lonsec Ratings: Generally, the investment should have at least a Lonsec Analyst Rating of 'Investment Grade (3)' or higher.</p> <p>However, to receive one-off approval the Responsible Manager will not solely rely on this material as there may be circumstances where such Research is not available. Where the research is not available, the Authorised Representative must provide sufficient research to demonstrate it is in the client's best interest to purchase or hold a particular investment. https://www.lonsec.com.au/</p>
Cash Management Accounts	<ul style="list-style-type: none"> • Any regulated by APRA.
Government & Corporate Bonds	<ul style="list-style-type: none"> • FIIG Securities • XTB Bonds
Life Insurance Products	<ul style="list-style-type: none"> • TAL

	<ul style="list-style-type: none"> • One Path • Zurich • AMP • BT Life • Asteron • AIA • MLC • Clearview • NEOS Life • Existing life insurance policies held via employer or superannuation arrangements and it is in the best interest of the client to retain or increase.
--	--

Super/Pension and IDPS Platforms	<p>Wrap Platforms:</p> <ul style="list-style-type: none"> • Asgard Infinity E-wrap Super and Investment • BT Select Wrap Super and Investment • BT Panorama Super an Investment (Compact and Full Menu) • HUB24 Super and Investment • Macquarie Super and Investment Consolidator II • Macquarie Super and Investment Manager II • Macquarie Super and Investment Accumulator II • MLC Wrap Super and Investment Series 2 • MLC Masterkey Super Fundamentals • Netwealth Super and Investment Accelerator Plus • GenerationLife Investment Bonds • Wealth02 Super and Investment • AMP MyNorth <p>Industry Funds:</p> <ul style="list-style-type: none"> • AustralianSuper • SunSuper For Life • Equip Myfuture <p>Other Funds:</p> <ul style="list-style-type: none"> • Any superannuation platform rated '4 Apples' or higher by Chant West may be acceptable with one-off approval. The Authorised Representative must provide research using the Chant West site and obtain one off approval from the Responsible Manager prior to recommending to the client. (https://www.chantwest.com.au/) • A clients existing superannuation fund, given it is in the best interest of the client to retain.
Annuities	Challenger

Managed Funds	<p>Morningstar:</p> <p>Generally, the investment should have at least a Morningstar Analyst Rating of ‘Bronze’ or higher. If the Morningstar Analyst Rating is lower than ‘Bronze’, the fund is also acceptable if it has a BT APL Status of ‘Buy’.</p> <p>However, to receive one-off approval the Responsible Manager will not solely rely on this material as there may be circumstances where such Research is not available. Where the research is not available, the Authorised Representative must provide sufficient research to demonstrate it is in the client’s best interest to purchase or hold a particular investment.</p> <p>https://arc2.morningstar.com.au/</p> <p>For more information on the Morningstar Fund Research Methodology, refer to the following link: https://insightinvestmentpartners.sharepoint.com/sites/InsightInvestmentPartnersIntranet/SitePages/Morningstar-Fund-Research-Methodology.aspx?Mode=Edit</p> <p>Lonsec Ratings:</p> <p>Generally, the investment should have at least a Lonsec Analyst Rating of ‘Investment Grade (3)’ or higher.</p> <p>However, to receive one-off approval the Responsible Manager will not solely rely on this material as there may be circumstances where such Research is not available. Where the research is not available, the Authorised Representative must provide sufficient research to demonstrate it is in the client’s best interest to purchase or hold a particular investment.</p> <p>https://www.lonsec.com.au/</p> <p>For more information on the Lonsec Research Methodology, refer to the following link: https://insightinvestmentpartners.sharepoint.com/:b:/r/sites/InsightInvestmentPartnersIntranet/Shared%20Documents/Training/Licensee%20Guides/Lonsec%20Rating%20Definitions.pdf?csf=1&e=jcuh6H</p> <p>Australian Equities</p> <ul style="list-style-type: none"> • Arnhem Australian Equity Fund (ARO0019AU) • Ausbil Australian Active Equity Fund (AAP0103AU) • Bennelong ex-20 Australian Equities Fund (BFL0004AU) • Elley Griffiths Grp Small Companies Fund (EGG0001AU) • Fidelity Australian Equities Fund (FID0008AU) • Hyperion Small Growth Companies Fund (BNT0101AU) • Investors Mutual Australian Share Fund (IML0002AU) • Nikko AM Tyndall Australian Share Wholesale Fund (TYN0028AU) • Pengana Emerging Companies Fund (PER0270AU) • Perpetual Pure Value Share Fund (PER0439AU) • Perpetual Wholesale Australian Share Fund (PER0049AU) • Perpetual Wholesale Concentrated Equity Fund (PER0102AU) • Perpetual Wholesale Industrial Share Fund (PER0046AU) • Perpetual Wholesale Share- Plus Long/Short Fund (PER0072AU) • SGH ICE Fund (ETL0062AU)
----------------------	---

	<ul style="list-style-type: none"> • Schroder Wholesale Australian Equity Fund (SCH0101AU) • Vanguard Australia Shares Fund (VAN0104AU) • Vanguard Australian Shares High Yield Fund VAN0104AU <p>International Equities</p> <ul style="list-style-type: none"> • Aberdeen Asian Opportunities Fund (EQI0028AU) • Arrowstreet Global Equity Fund (MAQ0464AU) • Franklin Global Growth Fund (FRT0009AU) • Grant Samuel Epoch Global Equity Shareholder Yield – Unhedged (GSF0002AU) • Grant Samuel Epoch Global Equity Shareholder Yield -Hedged (GSF0001AU) • IFP Global Franchise Fund (MAQ0404AU) • IFP Global Franchise Fund (Hedged) (MAQ06314AU) • Macquarie Asia New Stars No.1 Fund (MAQ0640AU) • Magellan Global Growth Fund (MGE0001AU) • Magellan Global Growth Fund - Hedged (MGE0007AU) • Magellan High Conviction Fund (MGE0005AU) • MFS Global Equity Trust (MIA0001AU) • MFS Fully Hedged Global Equity Trust (ETL0041AU) • Platinum Asia Fund (PLA0004AU) • Platinum International Fund (PLA0002AU) • Platinum European Fund (PLA0001AU) • Platinum International Brands Fund (PLA0100AU) • Platinum Japan Fund (PLA0003AU) • Platinum International Healthcare Fund (PLA0005AU) • Polaris Global Equity Fund (MAQ0838AU) • Vanguard International Shares Fund Index (VAN0003AU) • Vanguard International Share Index Fund – Hedged (VAN0105AU) • Walter Scott Global Equity Fund (MAQ0410AU) <p>Fixed Interest</p> <ul style="list-style-type: none"> • AMP Capital Corporate Bond Fund - Class A (AMP0557AU) • Henderson Tactical Income Fund (IOF0145AU) • Macquarie Income Opportunities Fund (MAQ0277AU) • Macquarie Master Diversified Fixed Interest Fund (MAQ0274AU) • Schroder Wholesale Credit Securities Fund (SCH0103AU) • Vanguard International Fixed Interest (VAN0103AU) • Vanguard Australian Fixed Interest Index Fund (VAN0001AU) • PIMCO Diversified Fixed Interest Fund (ETL0016AU) • PIMCO Wholesale Global Credit Fund (ETL0019AU) • UBS Australian Bond Fund (SBC0813AU) • UBS Diversified Fixed Income Fund (SBC0007AU) • Schroder Wholesale Fixed Income (SCH0028AU) <p>Property</p> <ul style="list-style-type: none"> • Vanguard Wholesale Australian Property Securities (VAN0004AU) • Vanguard Wholesale International Property Securities – Hedged (VAN0019AU)
--	---

	<ul style="list-style-type: none"> Vanguard Wholesale International Property Securities – Unhedged (VAN0018AU) <p>Alternatives</p> <ul style="list-style-type: none"> AQR WS Managed Futures Fund (PER0634AU) Lazard Global Listed Infrastructure (LAZ0014AU) Macquarie Int'l Infrastructure Securities Fund – Hedged (MAQ0432AU) Magellan Infrastructure Fund - Unhedged (MGE0006AU) Partners Group Global Value (ETL0277AU) Vanguard Global Infrastructure Index Fund (VAN0023AU) Winton Global Alpha (MAQ0482AU) <p>Cash (excludes cash accounts for IDPS and superannuation funds)</p> <ul style="list-style-type: none"> UBS Cash Fund (SBC0811AU) UBS Cash Plus Fund (SBC0812AU) <p>Pre Mixed</p> <ul style="list-style-type: none"> BT W/S Multi-Manager Conservative Fund (BTA0222AU) BT Wholesale Conservative Outlook Fund (BTA0805AU) Vanguard Conservative Index Fund (VAN0109AU) Vanguard Balanced Index Fund (VAN0108AU) Vanguard Growth Index Fund (VAN0110AU) Vanguard High Growth Index Fund (VAN0111AU) MLC Horizon Series <p>SMA</p> <ul style="list-style-type: none"> Macquarie Access Balanced Multi-Asset SMA (SMAMAQ02S) Macquarie Access Conservative Multi-Asset SMA (SMAMAQ03S) Macquarie Access Growth Multi-Asset SMA (SMAMAQ04S) Macquarie Evolve Balanced Multi-Asset SMA (SMAMAQ05S) Macquarie Evolve Conservative Multi-Asset SMA (SMAMAQ06S) Macquarie Evolve Growth Multi-Asset SMA (SMAMAQ07S) Morningstar High Growth (90) Managed Account Morningstar Growth (70) Managed Account Morningstar Balanced (50) Managed Account Morningstar Moderate (30) Managed Account Morningstar Conservative (15) Managed Account Morningstar Diversified Income Managed Account Morningstar Australian Shares Income Managed Account
Crypto Currencies	<ul style="list-style-type: none"> Apollo Capital Fund (Wholesale Only) CRYPT ETF (Retail & Wholesale)
Margin Lending	<ul style="list-style-type: none"> Adelaide Bank (Leveraged Equities) Commsec Margin Lending St George BT
Exchange Traded Funds	<ul style="list-style-type: none"> Beta Shares I Shares Vanguard Macquarie

Term Deposits	<ul style="list-style-type: none"> Any bank regulated by APRA.
Hybrid Australian Securities	<ul style="list-style-type: none"> Any ASX listed Hybrid security
Self-Managed Accounts (SMA's)	<ul style="list-style-type: none"> Macquarie Access Multi Asset Portfolios Macquarie Evolve Multi Asset Portfolios Vanguard's Diversified Managed Account Strategies Morningstar Managed Accounts
Individually Managed Accounts (IMA)	<ul style="list-style-type: none"> Implemented Portfolios Assure Invest

