

# Leading super fund research now available on iRate

Lonsec's iRate provides an unparalleled breadth and depth of qualitative research, including managed fund, listed product, super fund and super fund investment option research, accessible through a single portal, enabling an adviser to efficiently build a complete picture of a client's investment portfolio, to aid understanding and facilitate more informed and insightful conversations with your clients.

## Demystify your client's super

Produced by SuperRatings®, Lonsec's specialist superannuation product research team, iRate delivers research based on the most extensive benchmarking survey conducted in the Australian market. With Lonsec's super fund research you can:



Efficiently compare over 600 superannuation products across 300 characteristics covering Investment, Fees, Insurance, Member Servicing, Administration and Governance, that are used to determine a fund's overall rating



Search the iRate superannuation product universe and access product information, investment performance, fee data, and a wealth of other benchmarking metrics



Get relevant and useful information to aid your understanding of individual superannuation products and make personal advice recommendations based on your client's best interests



Generate intuitive, user-friendly reports to facilitate more insightful conversations



Access a wealth of investment product research through a single platform

## Superannuation product assessment and coverage

113

MySuper products

327

Member Choice products

182

Pension products



Investment



Fees & Charges



Insurance



Governance



Administration



Member Servicing

# Efficiently compare superannuation funds

With the Super Fund Comparison tool you can create simple yet powerful side-by-side comparison of funds based on key product information and data. Efficiently compare information on superannuation products by your client's age, gender, occupation category, account balance, salary and insurance cover. Detailed and visual reports help you have more insightful conversations with your clients about how your investment recommendations are in their best interest.

**Super Fund Comparison Report**  
SuperRatings Product Assessment

**Comparison Profile**  
Age: 40  
Gender: Female  
White Collar  
Balance: \$50,000  
Investment: Government  
Insurance: Excellent  
Administration: Excellent

**Super Fund Comparison Report**  
Performance Summary to 31 August 2018\*

	FYTD	1yr	3yr	5yr	7yr	10yr
AustralisSuper Personal - Balanced	2.6	13.2	10.5	10.3	10.7	7.5
Energy Super - Balanced Option	2.1	10.4	9.4	9.2	9.3	6.8
Sunsuper for Life - Socially Conscious Balanced	2.7	11.6	7.5	7.7	9.1	6.2
SFB0 Balanced (BS-76) Index	2.1	10.7	8.5	8.6	9.3	6.6

\*Performance greater than 1 year is annualised. Past performance is not a reliable indicator of future performance.

**Strategic Asset Allocation Breakdown**

Fund	Australian Shares	International Shares	Property	Alternatives	Fixed Interest	Cash	Other
AustralisSuper Personal - Balanced	23.0%	34.0%	7.0%	16.0%	10.0%	8.0%	6.0%
Energy Super - Balanced Option	29.0%	29.0%	10.0%	25.0%	10.0%	5.0%	1.0%
Sunsuper for Life - Socially Conscious Balanced	28.0%	29.0%	9.0%	25.0%	25.0%	1.0%	1.0%

## Want to find out more?

For more information on how you can start using SuperRatings® research through iRate, get in touch with our client services team on **1300 826 395** or email us at **info@lonsec.com.au**

**lonsecresearch.com.au/iRate**

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