

Active management, systematically

Using rigorous research and tested signals to guide portfolio decisions across a broad range of holdings.

WHAT IS ACTIVE MANAGEMENT?

Active management means making deliberate choices about which companies to own and how much to hold of each, trying to construct a portfolio that performs better than a broad market benchmark. Investment managers go about this differently. Some rely on a team of stock-pickers making high-conviction bets. Others use a more systematic approach, letting rigorous research and tested signals guide their decisions across a much broader set of holdings.

HOW VINVA APPROACHES ACTIVE MANAGEMENT

Vinva's approach starts with experienced investment professionals who generate insights and identify opportunities. Those insights are then deployed systematically — using technology and rigorous models to make decisions consistently across a global universe of companies..

HERE'S HOW IT WORKS

Vinva's investment team develops proprietary signals across factors such as valuation, earnings quality, sentiment, business conditions, industry dynamics, supply chain analysis and more. These signals are grounded in economic rationale, each one makes intuitive sense about why it might predict how a company will perform.

Those insights are converted into models that evaluate and rank companies. Technology processes hundreds of data sources continuously, enabling decisions at a scale and speed that human portfolio managers alone simply can't achieve. The result is deliberate, researched-based positions across a broad range of holdings, each weighted according to the team's analysis and signals.



ACTIVE, BUT DIVERSIFIED

Active management at Vinva is expressed through many small, considered decisions, grounded in research and human insight, across a broad, diversified portfolio, not a handful of concentrated positions.

You're getting many small, deliberate decisions informed by research and signals, applied continuously over time. This approach carries no particular tilt to value, growth, momentum or any single market trend. That diversification matters; it is designed to be applied across different market environments without depending on a single style or theme to perform.

WHY THIS APPROACH WORKS

Removing emotion and bias.

A systematic process seeks to reduce the cognitive biases that affect even experienced managers. Decisions are informed by data and economic insight, consistently applied at scale, without short-term sentiment swaying the outcome.

Consistency in both directions

The same logic applies to both buying and selling decisions. Many managers excel at identifying what to buy but can struggle with when to sell.

Vinva's systematic approach treats both equally, avoiding behavioural traps like holding on to past winners or delaying decisions on weaker positions.

Rigour without star-manager dependency

Vinva's approach has been refined and tested over decades. It doesn't depend on one individual. Their proprietary systematic process is intended to be more consistent and a collaborative effort rather than individual discretionary approaches.

WHAT THIS MEANS FOR YOU

Active management has always relied on human insight. Experienced judgement about which companies are better positioned than others. What systematic implementation adds is scale. Where a traditional active manager might cover hundreds of companies, Vinva's process applies that same rigorous, insight-driven research across thousands of stocks, continuously and without the emotional biases that can affect even the most experienced investor.

The result is active management that combines human insight with the consistency and reach that technology makes possible.

Through a retail distribution partnership with Magellan Investment Partners, investors can now access Vinva's Australian and global equity strategies across both long-only and alpha-extension in the retail market within Australia.

To find out more, visit: magellan-vinvafunds.com

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