
Investment Philosophy





A robust investment framework

In an increasingly complex world, it's vital that you know how we approach investing and what that means for you.

Our philosophy is driven by our investment principles. We use these principles to guide our thinking, behaviour and decision making.

01



We champion investors

We believe that if investors win, we all win.

We are independent minded which allows us to make investment decisions with the focus on helping investors meet their financial goals. Investment decisions are made with the end investor in mind.

02



We take a fundamental approach

We believe that fundamental factors, such as the quality of personnel and an investment's future earnings will drive results.

Powerful analytics and models are behind our research and portfolios, giving us the confidence to take a long-term perspective.

We stand firm behind our investment views, even if they are unpopular. This means being willing to ride out market volatility.

03



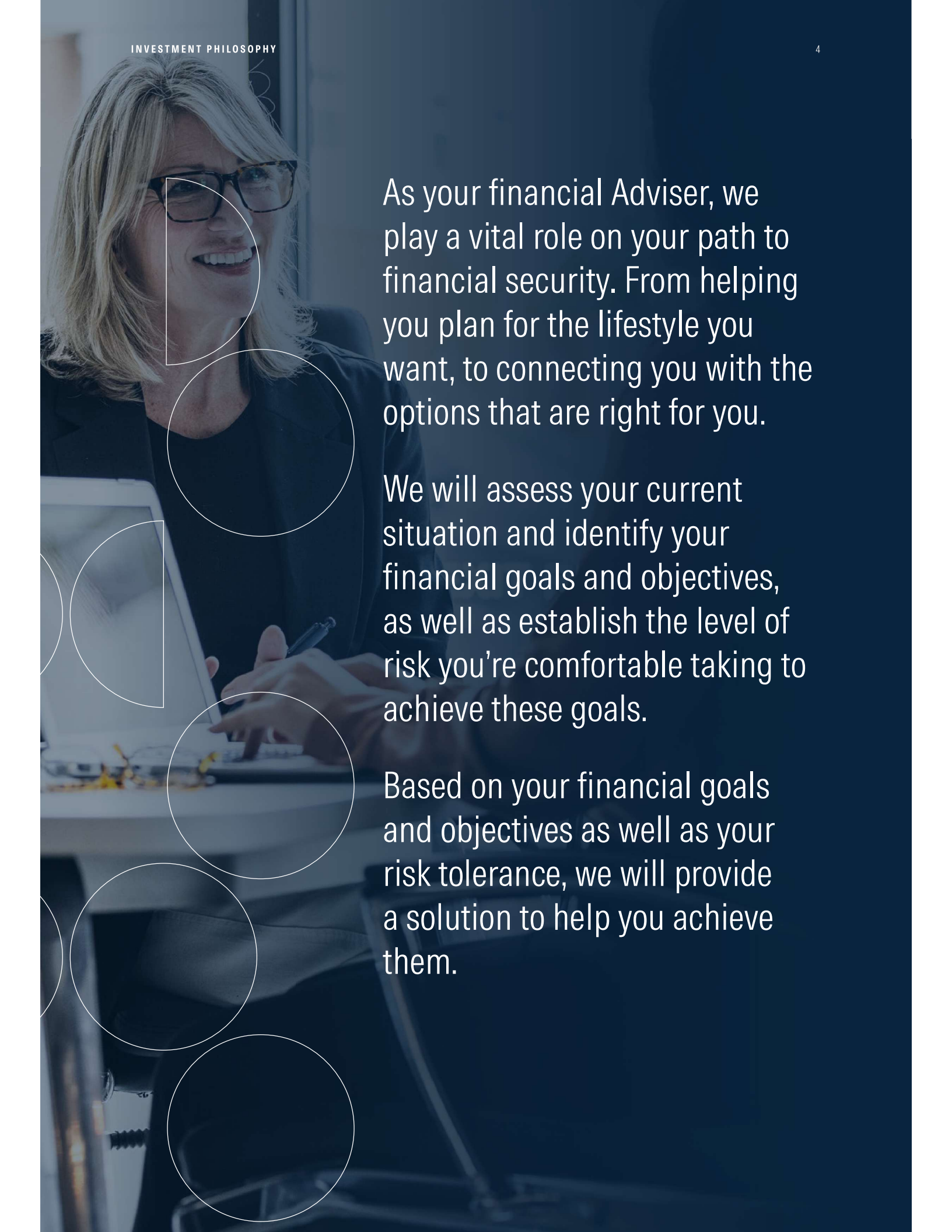
We believe that price matters

We anchor on an investment's underlying intrinsic value rather than fleeting news, sentiment or momentum.

Focusing on the difference between price and intrinsic value enables investors to get more than they're paying for.

We also believe controlling costs helps investors build wealth by letting them keep more of what they earn.





As your financial Adviser, we play a vital role on your path to financial security. From helping you plan for the lifestyle you want, to connecting you with the options that are right for you.

We will assess your current situation and identify your financial goals and objectives, as well as establish the level of risk you're comfortable taking to achieve these goals.

Based on your financial goals and objectives as well as your risk tolerance, we will provide a solution to help you achieve them.

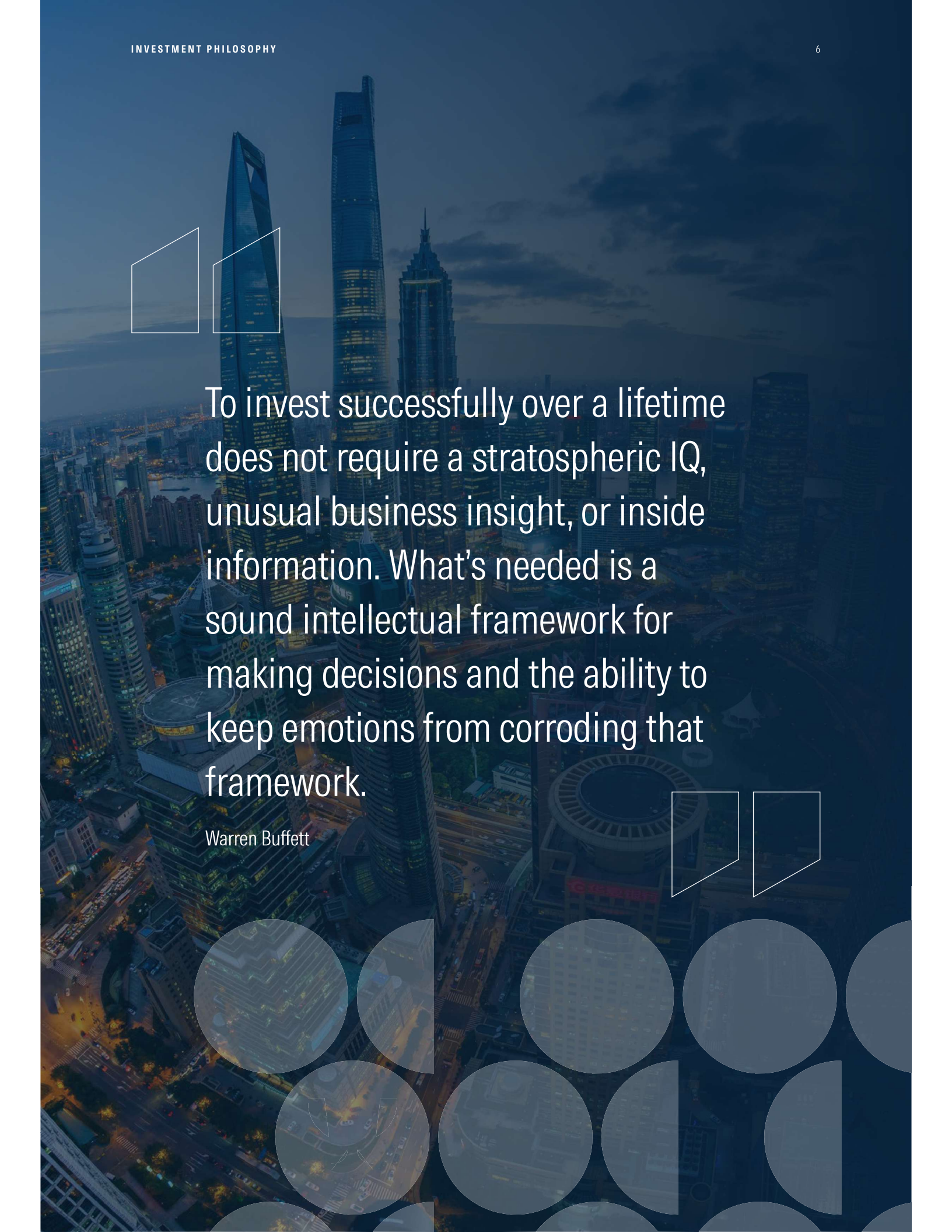
Putting it all together

We look for investment portfolios with robust strategies and strong management to achieve your investment goals. Portfolio construction is largely about risk management. Returns are the outcome of disciplined long-term investment strategies. The structure or investment vehicle can have a significant impact on the tax consequences of investing. By incorporating these investment principles, we can implement the investment strategy via the most appropriate vehicle for you to achieve your financial goals.

Making your goals our goals



At Stantins, we work with you to identify thoughtful long-term goals, and match you to the investment strategy to help you get there. In doing so, we strive to achieve consistent returns, focused on reaching your goals and aspirations.





To invest successfully over a lifetime does not require a stratospheric IQ, unusual business insight, or inside information. What's needed is a sound intellectual framework for making decisions and the ability to keep emotions from corroding that framework.

Warren Buffett



stantins

58 Burwood Rd,
Hawthorn,
VIC 3122

Talk to one of our advisers to explore your options.

☎ +61 3 9818 6000

✉ info@stantins.com.au

🌐 stantins.com.au



This document is issued by Morningstar Investment Management Australia Limited (ABN 54 071 808 501, AFS Licence No. 228986) ('Morningstar'). © Copyright of this document is owned by Morningstar and any related bodies corporate that are involved in the document's creation. As such the document, or any part of it, should not be copied, reproduced, scanned or embodied in any other document or distributed to another party without the prior written consent of Morningstar. The information provided is for general use only. In compiling this document, Morningstar has relied on information and data supplied by third parties including information providers (such as Standard and Poor's, MSCI, Barclays, FTSE). Whilst all reasonable care has been taken to ensure the accuracy of information provided, neither Morningstar nor its third parties accept responsibility for any inaccuracy or for investment decisions or any other actions taken by any person on the basis or context of the information included. Past performance is not a reliable indicator of future performance. Morningstar does not guarantee the performance of any investment or the return of capital. Morningstar warns that (a) Morningstar has not considered any individual person's objectives, financial situation or particular needs, and (b) individuals should seek advice and consider whether the advice is appropriate in light of their goals, objectives and current situation. Refer to our Financial Services Guide (FSG) for more information at morningstarinvestments.com.au/fsg. Before making any decision about whether to invest in a financial product, individuals should obtain and consider the disclosure document and the Target Market Determination (TMD).