

# North

## North Blend LB Managed Portfolios

Introducing a new innovative  
managed portfolio offer on North

A unique collaboration bringing a wealth of expertise together with North's innovative managed portfolio technology solution.



### Manager Research and Selection

- Lonsec Investment Solutions is a specialist model portfolio manager with extensive expertise in portfolio construction and active investment selection.
- Lonsec Investment Solutions' investment philosophy underpins their investment research driven approach to portfolio construction and the processes used to build quality investment solutions.



### Portfolio Management and Technology

- BlackRock is a global asset manager providing investment management, risk management and advisory services for institutional and retail clients.
- BlackRock aims to deliver tailored holistic investment solutions, investment technology capabilities, and ultimately help clients build resilient portfolios. construction and the processes used to build quality investment solutions.

Exclusive access of these managed portfolios is available via the **North** platform.

## Blend the managed portfolios with your practice's needs

### Creating your own bespoke blend

#### Choose Investment Style

Core

Active

#### Choose Risk Profiles

30 / 70

50 / 50

70 / 30

85 / 15

100 / 0

#### Substitute Assets

Managed Fund A

Exchange Traded Fund X

↕

Managed Fund B

Exchange Traded Fund Y

#### Name Portfolios

Your Practice Managed Portfolio



## Why use North Blend?



### **Institutional grade investment management**

The managed portfolios are backed by Lonsac Investment Solutions' investment manager research and manager selection with BlackRock's multi-asset investment expertise. Risk management and oversight includes using BlackRock's technology to continuously review underlying fund managers and portfolio outcomes.



### **Customisation to suit your practice needs**

Providing you with the opportunity to create unique solutions for your clients, North Blend allows asset substitutions to be applied to the portfolios. Substitute funds into the managed portfolios to create a bespoke blend, exclusive to your practice. Contact your BDM for more information on creating your own North Blend managed portfolios.



### **Efficiency and admin ease**

Rebalancing, trading and monitoring investments within the portfolios are completed by a specialised trading team at North (in collaboration with Lonsac Investment Solutions and BlackRock), which can allow for more time to be spent meeting existing clients' other needs, or even taking on new clients.



### **Adaptable to market changes**

The investment managers take responsibility for investment research and portfolio instructions, so there are fewer steps and admin with ongoing advice processes. This allows clients' investments to more efficiently respond to market volatility and for clients to be treated equally.



### **Cost benefits of scale**

North, together with Lonsac Investment Solutions and BlackRock, use their scale to negotiate discounts on underlying investments within the managed portfolios. This means a focus on ongoing fee outcomes for clients.



### **Technology and reporting**

On-demand client reporting is available via North Online to track the portfolio outcomes of your clients. Access BlackRock's Model Evaluator tool for portfolio insights, reporting and resources to ensure you are well informed.



### **Support network**

We're available to help. Contact your dedicated North BDM for any questions on how North Blend can help your clients and your business.



## Available Now

Access the managed portfolios now via the **North** platform.

Interested in creating your own North Blend managed portfolios? Contact your BDM for more information and speak to us about your portfolio construction approach.

Investment option	Code	Target Growth exposure	Investment style	Investment management fee p.a. <sup>1</sup>
Core				
North Blend LB Core 30 Portfolio	NTH0517	<div><div>30%</div></div>	Core-satellite Multi-asset Multi- manager	0.37%
North Blend LB Core 50 Portfolio	NTH0518	<div><div>50%</div></div>		0.37%
North Blend LB Core 70 Portfolio	NTH0519	<div><div>70%</div></div>		0.37%
North Blend LB Core 85 Portfolio	NTH0520	<div><div>85%</div></div>		0.37%
North Blend LB Core 100 Portfolio	NTH0521	<div><div>100%</div></div>		0.37%
Active				
North Blend LB Active 30 Portfolio	NTH0522	<div><div>30%</div></div>	Active Multi-asset Multi- manager	0.37%
North Blend LB Active 50 Portfolio	NTH0523	<div><div>50%</div></div>		0.37%
North Blend LB Active 70 Portfolio	NTH0524	<div><div>70%</div></div>		0.37%
North Blend LB Active 85 Portfolio	NTH0525	<div><div>85%</div></div>		0.37%
North Blend LB Active 100 Portfolio	NTH0526	<div><div>100%</div></div>		0.37%

For more information, refer to the Product Disclosure Statement and Target Market Determination available at:

[northonline.com.au/adviser/products/managed-portfolios/north-blend](https://northonline.com.au/adviser/products/managed-portfolios/north-blend)



## Why North?

Our technology and products are intrinsically linked, and we are continually innovating and investing in the features that can give you and your clients an edge.

And now with our MyNorth Managed Portfolios, you have the choice to buy, badge, build, or blend, enabling **broader customisation and flexibility in constructing portfolios**.

North offers fractional share trading and same day buy and sell of managed funds, improving client outcomes from enhanced tracking of the manager's target model and reduced cash drag.

When it comes to investments, our goal is to give you more. More options, more features, more choice. **North. A better way to invest.**

## We're here to help you so please get in touch

To find out more about how North Blend Managed Portfolios can help your clients and your business, contact your BDM.

### What you need to know

Information current as at June 2025. This information has been provided by NMMT Limited ABN 42 058 835 573, AFSL 234653 (NMMT) and is general in nature. It's for professional adviser use only and must not be distributed or made available to retail clients.

This information does not take account of a person's personal objectives, financial situation or needs, and a person should consider whether this information is appropriate for them before making any decisions. It's important a person considers their circumstances and reads the Product Disclosure Statement (PDS) and target market determination for MyNorth Managed Portfolios available from [northonline.com.au](http://northonline.com.au) or by contacting the North Service Centre on 1800 667 841, before deciding what's right for them.

You can read the [Financial Services Guide](#) issued by NMMT online for more information, including the fees and benefits that companies related to NMMT, N.M. Superannuation Proprietary Limited (ABN 31 008 428 322, AFSL 234654 (N.M. Super) and their representatives may receive in relation to products and services provided. You can also ask us for a hard copy.

NMMT issues the interests in and is the responsible entity for MyNorth Managed Portfolios (ARSN 624 544 136), through which the North Blend LB Managed Portfolio is offered. All managed portfolios may not be available across all products on the MyNorth platform and are only available via a financial adviser.

Although the information is from sources considered reliable, NMMT doesn't guarantee that it's accurate or complete. You shouldn't rely upon it and should seek professional advice before making any financial decision. Except where liability under any statute can't be excluded, NMMT and its related parties do not accept any liability for any resulting loss or damage to the reader or any other person.

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<sup>1</sup> There are other fees and costs that will apply to an investment in MyNorth Managed Portfolios. You should refer to the current North Blend LB Managed Portfolios PDS (Part 3) available at [northonline.com.au/product-documents](http://northonline.com.au/product-documents) for the latest ongoing annual fees and costs.