

MASON STEVENS ADDS THE FOLKESTONE MAXIM A-REIT SECURITIES PORTFOLIO TO ITS MANAGED ACCOUNT SERVICE

Mason Stevens today announced the launch of a new managed account – the **Folkestone Maxim A-REIT Securities Portfolio (the Portfolio)**, which is managed by Folkestone Maxim Asset Management Limited, on its Managed Account service.

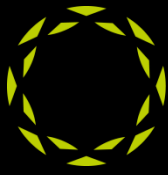
Investors will benefit from Folkestone Maxim’s high conviction approach to investing delivered through a transparent, separately managed account structure. The Portfolio adopts a standalone strategy available only in an SMA format, rather than replicating an existing managed fund.

Folkestone Maxim utilises a disciplined investment process combining in-depth fundamental research with disciplined portfolio construction and risk controls to add consistent value over time. The basic premise of Folkestone Maxim’s investment philosophy is that there is a close relationship between the real estate market cycle and the economic cycle.

Managing Director of Mason Stevens Adviser Services, Thomas Bignill, said “Mason Stevens is committed to providing our clients with access to leading investment solutions and best of breed investment managers.” “The depth of experience across Folkestone’s real estate funds platform is remarkable. We’re excited to be able to add the Portfolio to the Mason Stevens Managed Account service,” said Mr Bignill.

Folkestone Managing Director, Greg Paramor, said “This offers a completely automated SMA investment option for advisers and their clients looking to invest in A-REITs. It’s ideal for SMSF (self-managed super funds) and high net worth clients seeking transparency, cost effectiveness and flexibility in investment management and reporting.”

The Mason Stevens Managed Account service holds and administers the securities in the Portfolio via its multi-asset, multi-currency administration system. Investors experience the benefits of direct security ownership, including more efficient tax outcomes, liquidity and daily reporting.



About Mason Stevens

Mason Stevens is an investment management firm that provides a transparent and complete direct service for its clients.

Its investment capabilities facilitate advice and execution across domestic and international equities, equity derivatives (exchange traded options and OTC options), domestic and international fixed income securities, hybrids and bonds.

Critical to the Mason Stevens proposition is a multi-asset, multi-currency back-end reporting system that provides clients with daily access to their portfolio positions and valuations, in addition to year-end tax reporting.

About Folkestone Maxim Asset Management Limited

Folkestone is an ASX listed (ASX code: FLK) real estate funds manager and developer providing real estate wealth solutions. Folkestone's funds management platform offers listed and unlisted real estate funds to private clients and select institutional investors, while on balance sheet activities focus on value-add and opportunistic (development) real estate investments.

Folkestone currently has more than \$870 million in funds under management.

Folkestone Maxim is a wholly owned subsidiary of Folkestone, and is a boutique real estate investment manager, specialising in A-REIT securities.

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