



Overview

Ascalon Signpost Series



Overview of Ascalon

The Ascalon is an institutional-grade Investment Consulting service. Ascalon provides a better and differentiated experience for clients. We build and manage portfolios that will protect through the economic and investment cycle. Ascalon has a robust investment process, a deeply experienced and qualified team and a focus on achieving investment objectives. Our transparent, collaborative and repeatable service sets us apart and helps us improve your investment experience for the better.



Ascalon is a flexible, comprehensive framework following a repeatable process to deliver great investment outcomes.

What is Ascalon?

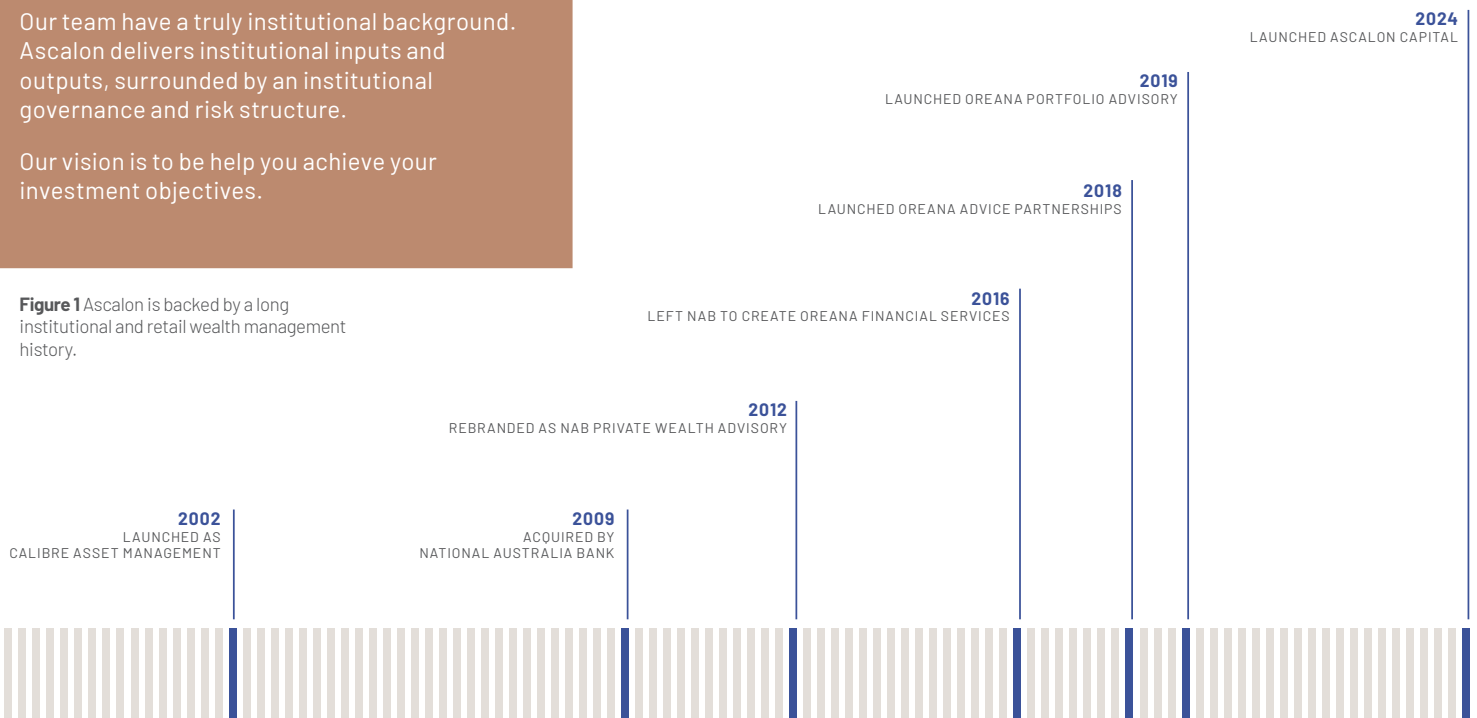
The Ascalon Capital Service (Ascalon) is an institutional-grade Investment Consulting service. Ascalon provides a better and differentiated experience for you.

Ascalon is a flexible, comprehensive framework following a repeatable process to deliver great investment outcomes.

Our team have a truly institutional background. Ascalon delivers institutional inputs and outputs, surrounded by an institutional governance and risk structure.

Our vision is to be help you achieve your investment objectives.

Figure 1 Ascalon is backed by a long institutional and retail wealth management history.





The Ascalon Mission, Philosophy and Process.

Our Mission

We want to help you achieve your investment objectives.

We do this by building and managing portfolios that will protect you through the economic and investment cycle.

We strive to improve the probability of delivering your investment objectives.

We adhere to a clear and repeatable investment process. That process prioritizes risk management and focuses on risk-adjusted returns.

Our Philosophy

We believe a clear framework, strong governance and repeatable process can help achieve your investment objectives.

Our Process

We follow a clear process to map mission and objectives to investment outcomes. Risk management and governance are key to the process.

Our portfolio construction, asset allocation and manager selection processes are backed by a transparent, repeatable and quantitative framework with a sensible qualitative overlay.



We strive to improve the probability of delivering your investment objectives.

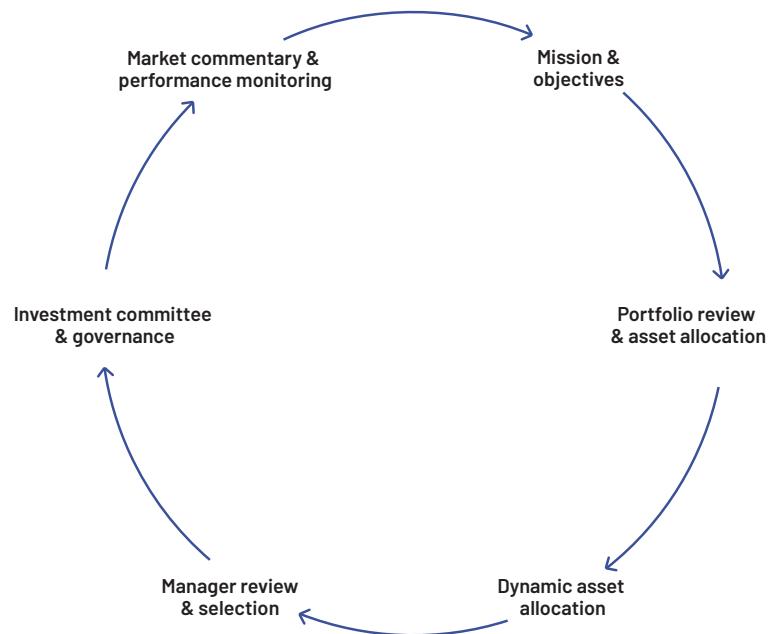


Figure 2 Ascalon is an End-to-End, continuous and repeatable process, mapping mission and objectives to investment outcomes.



1. **A robust investment program:** Ascalon incorporates a robust set of end-to-end investment governance and risk management processes.

We use repeatable asset allocation processes combined with an institutional framework for manager research and selection to deliver great investment outcomes.

Our manager research efforts are focused on preferred investments and relevant back-up strategies.

2. **An experienced and capable team:** Ascalon has tailored existing investment capabilities for investors in the Asia Pacific markets.

We have a complementary skillset across global and domestic markets, with an institutional and retail background, giving you access to a unique and diverse investment opportunity set.

3. **Solutions and ongoing service packages:**

Ascalon provides a range of portfolio implementation opportunities that optimize risk-adjusted returns.

We offer a range of ongoing service packages that align value to cost.

Solutions can be tailored to meet your needs and the characteristics of your mission objectives.

You can access differentiated investment opportunities, solutions and engagement tools.

4. **A transparent, collaborative service offering to improve outcomes.** Ascalon is committed to a clear, transparent service with ongoing collaboration, continuous improvement and innovation.



We use repeatable asset allocation processes combined with an institutional framework for manager research and selection to deliver great investment outcomes.



Level 16/627 Chapel Street, South Yarra, VIC 3182

T +61 03 9804 7113

E shane.hawke@ascalon.com

W ascaloncapital.com.au

© Ascalon. SFC CE No: AHX191. Oreana Financial Services Pty Ltd. ABN: 91607515122. AFSL No: 482234