

ENRIZENONE

Investment Philosophy



Our Beliefs

Our priority is our clients, and our focus is to provide them with every opportunity for success to reach their goals and allow them to live the life they choose. We believe in a consistently applied set of investment principles to guide our decision making and in turn, providing consistency and discipline to your investment objectives.

Our Investment Philosophy

Enrizen One aims to educate clients in the fundamentals of long-term investing by adhering to our key principles:



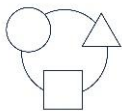
Markets Work

Prices in the market quickly and fully reflect the knowledge, expectations, and sentiment of investors. So, to perfect the art of effectively selecting shares and timing the market adds little value over the long term to the investment plans of most people. We take the view that time in the market is the key to long term performance.



Risk and Return are Related

The belief by many that they can achieve a sustainable high return with low risk is fraught with danger. The simple fact is in order to achieve higher returns you must take greater investment risk. Where there is increased uncertainty of returns and increased volatility in capital invested, an investor would expect markets to compensate them accordingly.



Diversification is Imperative

Combining different asset classes with different return characteristics can reduce portfolio volatility by increasing the number of investments.



Asset Allocation Accounts for Performance

Academic research* shows 94% of portfolio returns variance is from asset allocation, and only a small portion from market timing & security selection. Returns depend on defensive vs growth asset investment.



Discipline is Paramount

Staying disciplined with long-term plans, even when investments are not producing desired results or are unpredictable, will lead to successful investment outcomes.



Risk Managed Performance

The belief by many that they can achieve a sustainable high return with low risk is fraught with danger. The simple fact is to achieve higher returns you must take greater investment risk. Where there is increased uncertainty of returns and increased volatility in capital invested, an investor would expect markets to compensate them accordingly. After all, would you expect the same return and risk attached to a share portfolio versus a secure cash investment?



Our Trusted Investment Partners

Our focus is to understand your goals and objectives, develop a plan and create a long-term investment direction. We then partner with specialist investment managers to provide the support and guidance around your underlying investments where they focus on making investment decisions day to day to help improve the performance of your portfolio while managing the investment risks and volatility over time.

It is not necessary to successfully time your way into and out of markets, stock pick or speculate to achieve a successful investment experience. Our goal is to maximise the benefits of asset-class diversification when structuring our client portfolios by taking a long-term approach.

*Source: Study of 91 large pension plan over 10-year period. Gary P. Brinson, L. Randolph Hood and Gilbert L. Beebower, "Determinants of Portfolio Performance", Financial Analysts Journal, July-August 1986, pp. 39-44.

Get in touch

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