

## Research spurs concentrated portfolio



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by WP | 30 May 2013

Following yesterday's debate between concentrated or diversified equity portfolios, boutique equities manager, Prime Value Asset Management has launched a new concentrated equities fund.

The Prime Value Opportunities Fund is structured to balance outperformance with capital preservation. It will hold between 10 and 30 stocks mainly across the ASX, with two additional features not found in other Prime Value offerings:

1. The ability to allocate up to 100% of the portfolio to cash
2. A mandate allowing up to 20% of the portfolio allocated to international stocks

ST Wong, portfolio manager of the fund, says it suits investors seeking

a concentrated non-benchmark aware portfolio to complement other diversified strategies.

The ability to allocate up to 100% cash is a response to feedback Prime Value has received from family office and high net worth investors. "We have always prioritised capital preservation but feel the potential for 100% cash allocation fills a market need and reflects our mandate for absolute returns over the medium term," says Wong.

Read yesterday's article [here](#).



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