



## About Bluebird Portfolio Services (Bluebird)

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### Bill Keenan

The founder of Bluebird, Bill Keenan, has over 25 years' experience managing direct portfolios at major firms including: Lonsec, TOWER and IOOF. He also holds a Bachelor of Business (Accounting) degree and a Graduate Diploma in Finance and Investment. More importantly, Bill has a solid track record of exceeding market returns, without additional risk. Bill founded Bluebird in 2017 and employs the latest version of his investment philosophy and process at Bluebird.

More detail:

- Over 25 years' experience in portfolio management and equities research.
- Head of Equities, Lonsec, 2006-2017, over 11 years.
- Investment Manager, TOWER Trust, 1997-2005, over 8 years.
- Investment Supervisor, IOOF Trustees, 1995-1997, over 2 years.
- Experienced in asset allocation, investment strategy, company research and valuation, portfolio construction, risk management and managed accounts.
- Top-quartile investment performance track record.
- Managed analyst teams of up to 8 people.
- Experienced strategist and media/client presenter.
- Hold Bachelor of Business (Accounting) degree and Graduate Diploma in Finance and Investment.

### Bluebird Portfolio Services

Bluebird has been established to provide high quality (and high performing) portfolios, for financial advisers, under low cost consulting and portfolio management packages. Bluebird works with advisers to improve the quality of their individually managed accounts and provides a pathway to automated managed accounts at a low cost of 0.20% p.a. Bluebird – quality portfolios at a low cost.

### Investment Philosophy and Process

Bluebird has developed an investment philosophy and process that has a proven track record of generating returns above the market, without additional risk. This philosophy combines three investment criteria or factors: Quality, Value and Momentum. Bluebird seeks to invest in quality companies that offer value and have positive momentum. Bluebird avoids quality companies that are expensive or poor-quality companies that are cheap (that is where most investors go wrong). Finding quality companies that offer value is easier said than done and requires a very thorough and objective process to be effective. The founder of Bluebird has developed such a process, over the past 25 years, and the latest version is employed at Bluebird. The philosophy and process has in-built capital protection measures including: quality and value filters, portfolio diversification, defensive stock bias and employment of gold equity hedges and/or cash weightings, if required.