

# The House Strategy

A dynamic, discretionary approach to portfolio management

In complex markets, static portfolios create unnecessary risk.

The **OCM House Strategy** is a centrally managed, discretionary approach that dynamically adjusts asset allocation in line with our forward-looking views on **risk, return and market conditions**.

*Your portfolio evolves as our strategy evolves.*

Strategic asset allocation, actively managed

We continuously assess:

- Macroeconomic trends
- Valuation and market cycles
- Geopolitical risk
- Forward-looking return expectations



#### Long Hold (LH)

*Growth-focused, long-term capital appreciation*



#### Volatility Managed (OBI)

*Dual mandate: outcome delivery with risk awareness*



#### Defensive Positioning

*When preservation becomes the priority*

## Why sophisticated investors adopt this approach

- **Proactive Positioning:** Forward-looking, not reactive
- **Discretionary Execution:** Timely implementation without delay
- **Risk Calibration:** Exposure adjusted as market conditions shift
- **Clarity:** One coherent strategy, not fragmented decisions

## Risk Management, Not Risk Elimination

Our volatility-managed approach is designed to mitigate downside risk over time however.

**Capital preservation is an objective, not a guarantee.**

- Market risk cannot be eliminated
- Portfolio values will fluctuate
- Downside periods are an inherent part of investing

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## Structured Capital Allocation

For HNW clients, the House Strategy forms part of a segmented portfolio structure, not a single allocation.

**To manage systematic risk, we typically apply the strategy to capital allocated for:**

- Medium-term deployment (3–6 years)
- Long-term growth (7+ years)

**Aligned to your risk framework:**

- Structured around your risk profile & capacity for loss
- Exposure increases only within agreed parameters
- Integrated with your wider financial planning strategy

This ensures a balance between **opportunity capture and risk discipline**. The House Strategy is focused on medium and long-term capital, where dynamic allocation can enhance outcomes.

## Discretion With Oversight

**You retain full control over how the strategy is implemented:**

- **Full discretion:** Portfolios adjusted in line with the house view
- **Advised discretion:** Strategic changes discussed and agreed

**Portfolio changes reflect:**

- Our central investment view
- Your risk parameters and objectives

## Important Information (Compliance)

- **The value of investments** may fall as well as rise, and you may get back less than invested
- **Past performance** is not a reliable indicator of future results
- **Asset allocation** decisions reflect current views and may change without notice
- **Volatility-managed and capital preservation** strategies do not guarantee protection against loss
- **Tax treatment** depends on individual circumstances and may change