

PORTFOLIO LENDING AGAINST INTERNATIONAL SHARES.

Bell Potter Portfolio Lending has added international shares across a range of major exchanges to our Portfolio Lending Approved List. The operation is straightforward and fits neatly into our traditional margin lending offering.

Features

LVR'S

Bell Potter Capital's typical LVR for major global companies is 70%.

LOANS WILL ONLY BE MADE IN A\$

We will examine incorporating currency hedging within the facility as a future enhancement.

PRICING

All shares will be priced in A\$ on the client's Portfolio Lending account with end of day pricing for each overseas market.

CUSTODY

All client stock will be held by Citibank subject to a security interest from Bell Potter Capital. Consequently, unlike many US based lenders the client will retain beneficial ownership of the stock.

MARGIN CALLS

Margin calls are calculated with closing prices in Australia for Australian stocks and the latest prices we have available for International Stocks.

ACCOUNT OPENING

No additional documents are required for active Portfolio Lending accounts. Standard account opening procedures apply for new Lending clients.

COLLATERAL

Clients may use their existing approved domestic stock holdings as collateral for any lending against International share purchases.

RATES

Very competitive variable and fixed rates available.

Benefits

MARGIN CALL BUFFER

Bell Potter Capital offers a 10% margin call buffer.

QUICK RESPONSE TO LVR REQUESTS

If requested we will consider the client's whole Portfolio to assess whether we can offer a higher LVR than the published rate or special LVR's on stocks not on our Approved List.

APPROVED SECURITIES LIST

We are open to expanding the Approved List as demand arises. International Securities however must meet our lending criteria and as a guide must have a market cap of at least USD \$5bn and sustainable earnings.

SIMPLE ORGANISATIONAL STRUCTURE

Ensuring quick response times to special lending requests and the ability to readily assess a client's individual circumstances on a case by case basis.

DIRECT ACCESS TO DEDICATED ACCOUNT MANAGERS

Ensuring continuity and quality of service on all lending and Cash Trust enquiries.

FEES

There are no establishment, maintenance or administration fees, no minimum balance requirements and no fixed term for the facility. A Portfolio Lending account can remain undrawn until required at no cost to the client.

How it works

ORDERS

Orders will be placed via Bell Potter Securities new International System. For Portfolio Lending, contract notes will be issued in A\$ and Bell Potter Capital will be settling in A\$.

CLIENTS INTERNATIONAL HOLDINGS

Clients will be able to view their international holdings alongside their domestic stock holdings either via their online access or their monthly statement.

MARGIN LENDING CALCULATIONS

All calculations will be done in A\$.

CURRENCY FLUCTUATIONS

It is important to remember that currency movements alone could potentially give rise to a margin call.

PRICING UPDATES

We are currently running pricing updates for international shares in the margin lending system at 7:15am, 2:35pm and 11pm local time.

CURRENCY CONVERSIONS

Currency conversions will be done at the real-time spot exchange rate at the time the price download is done.

DIVIDENDS

Dividend handling arrangements are flexible.

STOCK TRANSFERS

We can arrange for stock to be transferred in or out of the client's Portfolio Lending Account in much the same way as we do for Australian shares.

Learn More

If you would like to request an LVR on an International stock not currently on our Approved List, please email Chris Faulkner at cfaulkner@bellpotter.com.au with the full security details i.e. stock name and code, class of share, exchange etc.

For more information on how your clients can use their existing Portfolio Lending account, or to set up a new Portfolio Lending account please contact Chris Faulkner on x1837, or account managers Tim Worth on x1947 or Katie Webster on x1609.

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