



The Smart Investors Guide to **DIVERSIVIEW**



Dr Laura Rusu

CEO/FOUNDER

DIVERSIVIEW & LENSELL GROUP

My name is Dr Laura Rusu and I am the Founder and CEO of LenseLL Group.

I have been in the technology space for over 25 years, and as an investor myself I have witnessed a wide array of challenges that come with financial investing and maximising returns.

Every day, people are inundated with recommendations from friends, family, media and online experts and the amount of information available continues to rise. Unfortunately, taking this well meaning advice often leads to a negative impact on people's returns and has a detrimental effect on their financial security.

In my experience, the most successful investors have educated themselves and spent more time exploring in depth the range of potential outcomes of any proposed financial decision. Investing is not a 'one size fits all' and each decision should be based on the specific financial goals of the individual.

With continual advancements in technology this exploration has never been easier, providing you have access to a proven reliable system, and a little know how...

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Introduction

Most investors will never get the returns they dream of.

There are many reasons for this. A large number of new or even seasoned investors are leaving their returns largely to chance, 'rolling the dice' and hoping for a great return. They are doing the best they can with a general understanding of investing and overall limited financial intelligence.

One of the biggest challenges investors face is finding the delicate balance and best possible combination of investments to achieve specific goals. This is in addition to maximising their portfolio return and minimising their risk.

In this e-book we will show you how to do exactly that with a unique, sophisticated, and powerful platform.

We will show you how to make the best use of your time with some exceptional tools that can help you get the most out of your hard-earned dollars, AND give you the best chance of achieving your financial goals.

You don't have to have multiple degrees in economics to be a successful investor however there are a few things you need to know. In this book you can draw on decades of financial expertise and Nobel Prize Winning research to back it up.

You will learn how to:

- **Understand** how your portfolio comes together and easily analyse your results.
- **Visualise** clearly the balance of your investments and perform a 'health check'.
- **Evaluate** your current Risk vs Return position.
- **Optimise asset allocation** by playing with different options to create better results.
- **Minimise risk and maximise return** by strategically planning where you want to be.



What is Diversiview?

Diversiview is the only software available that allows you to balance your investment portfolio minimizing risk and maximizing return.



Diversiview calculates the asset allocation that does this for you on an existing portfolio or an entirely new one. This means no more guess work.



Diversiview provides a platform for you to:

1. Establish whether your current investments help you achieve your financial goals.
[Forecast the expected value of your portfolio 5 or 10 years from now.](#)
2. Explore alternative and viable investments worldwide with easy-to-use performance filters.
[Discover potentially rewarding investments in different markets.](#)
3. Optimise your portfolio to increase your chances of higher returns.
[Find portfolio positions that maximise the expected return for the level of risk taken.](#)
4. Validate your diversification across investment types and geographies, to reduce your risk exposure.
[See how correlated all pairs of investments in your portfolio really are.](#)
5. Compare potential outcomes and build the portfolio that best suits your goals, prior to financial commitment.
[Run and compare unlimited portfolio scenarios in minutes, before transacting.](#)
6. Backtest your strategy for confidence and peace of mind.
[See how your choice of investments would have performed over the past year.](#)

Optimising regularly gets you better long term returns compared with any other portfolio management strategies.

How Diversiview works

Diversiview offers a unique view of your investments through your Portfolio Universe and allows you to analyse and recalibrate as often as you like (24/7).

This gives you the best chance at a consistently optimized portfolio translating to a higher rate of better returns.

- **Analyse** an existing portfolio or design a new one (including uploading from csv or import from Sharesight)
- **Visualise** risk vs return on all investment options, as well as real diversification via detailed analysis pages
- **Optimise** mixed portfolios of securities, cash, and other investments.

- **Recalibrate** portfolio based on your goals by seeing other potential positions for your set of investments.
- **Review** with detailed analysis pages highlighting valuable insights.

Diversiview is fast and easy to use with huge benefits for

- financial professionals,
- experienced investors and
- individuals who are brand new to investing.

The same process can be used for designing a new portfolio or optimising an existing one and is easily broken down into **4 simple steps**.



Four simple steps...

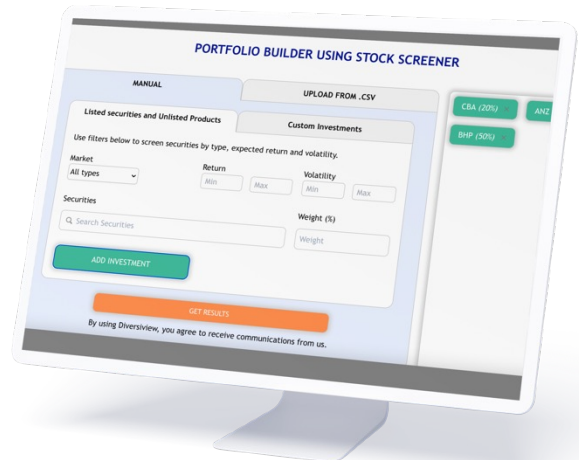
Step 1 - Analysis and Perform a Health Check

Simply choose to enter your investments manually with the option of adding weights if known, as well as:

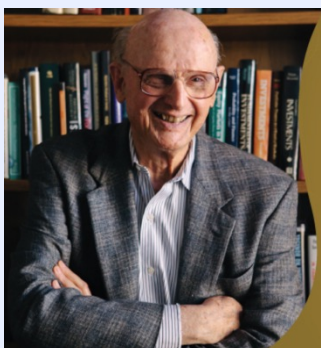
- Cash
- Term deposits and
- Property investments

Or, if you have a larger portfolio you can also upload it from CSV.

As proud partners with Sharesight you can import and optimise this portfolio directly from the Diversiview dashboard without time consuming manual data entry.



Diversiview combines state-of-the-art technology and Nobel Prize Winning Financial Research from Harry Markowitz.



1990 NOBEL MEMORIAL PRIZE
IN ECONOMIC SCIENCES



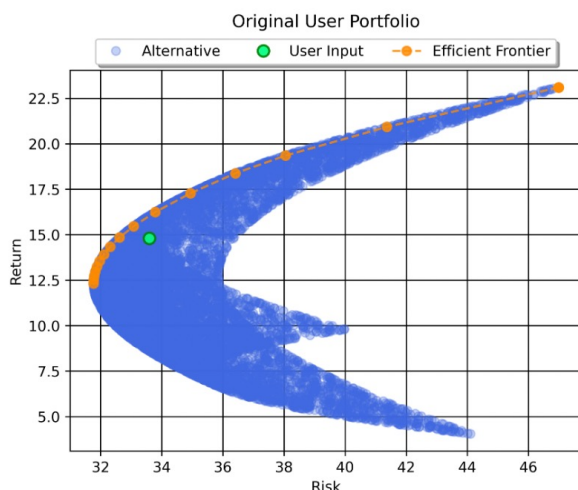
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Step 2 - View your Portfolio Universe

Diversiview uses complex health indicators widely used by financial professionals to help you understand and compare your portfolio against the Australian market.

Your **Portfolio Universe** shows your personal portfolio on a Risk Return dimension. Here you can clearly see which combination of your investments give you the biggest gains.

Your **Portfolio Universe** also displays a magnitude of other potential positions for your same set of investments. These may include potential allocations that offer a **higher return**, **lower risk** or **both**.



In order to improve your portfolio, you first need to know how it is expected to perform.

How you get better results

Step 3 - The Diversiview 'Deep Dive'

This is where individual correlations between all pairs of investments are shown.

The system quickly and easily highlights strong correlations that may hinder diversification.



Diversiview allows you to explore how to get better results and offers ways to recalibrate your portfolio based on your financial goals at ANY time.

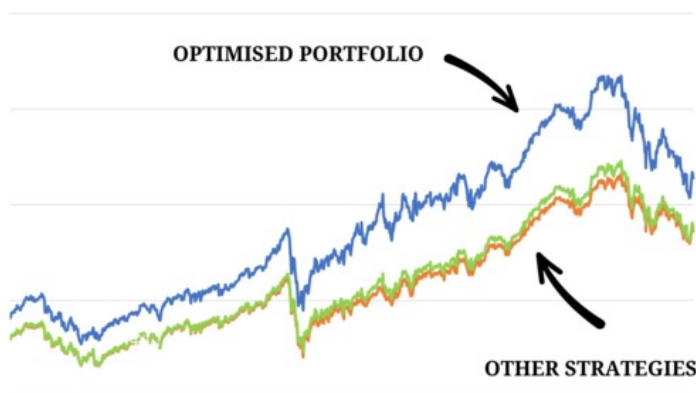
Step 4 -Optimisation

Now it's time to access 4 powerful methods to optimize your portfolio allowing you to:

- Analyse with preferred returns
- Balance to minimum risk
- Balance to maximum return and minimum risk
- Find efficient frontier positions

This includes the option to 'balance to optimal portfolio'.

Diversiview computes the risk and return for millions of different potential allocations for your specific set of securities and finds the one that best suits your needs - in seconds.

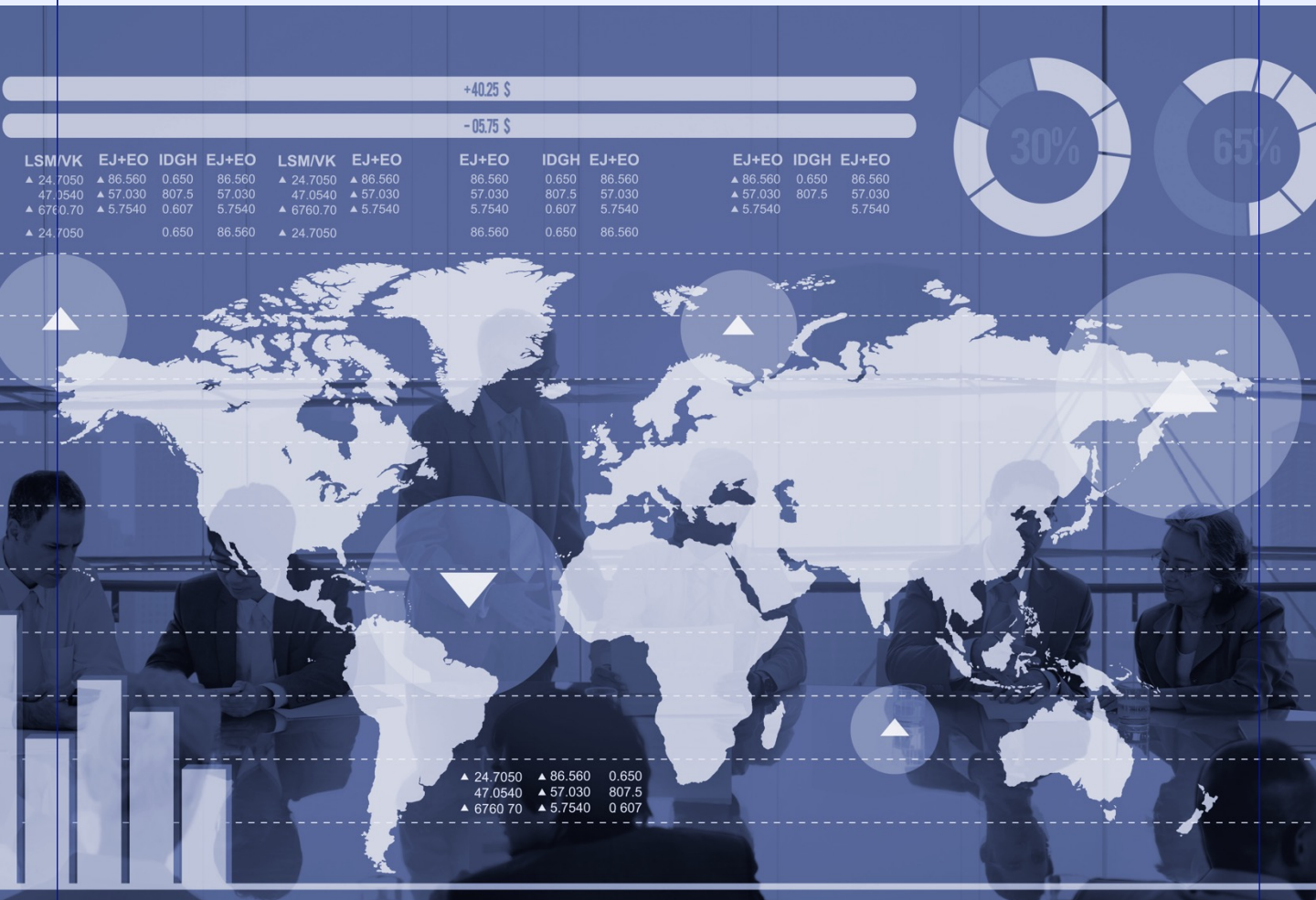


Optimising regularly ensures your portfolio is performing consistently at the highest level increasing maximum gain and returns.

A globally targetted application

Diversiview is continually developing, improving and expanding.

Currently covering Australia and US stocks, we aim to include India and several other countries later this year...



What our users have said...

”

“A very useful tool to select
the right ETFs”

AG - Financial Planner

”

“It’s the only tool of it’s kind
I have found!”

NS - Financial Advisor

”

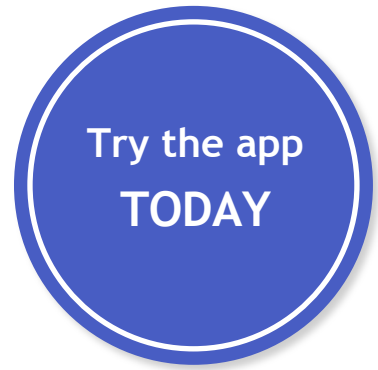
“Simplicity. Beta data in one
place. Great visual”

PM - Self direct Investor

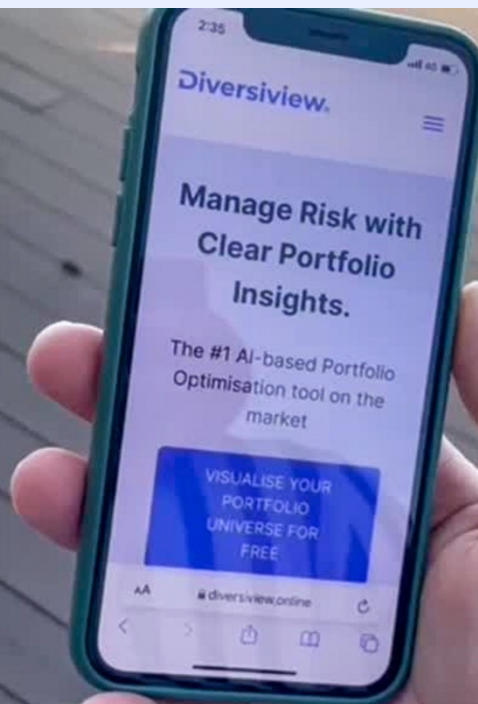
Do better. Gain more.

You have everything to gain

- 1 Take Control and feel empowered about your financial future
- 2 Maximise your returns and minimize risk
- 3 Do Better with DIVERSIVIEW



**GIVE IT A
TRY NOW**



CONTACT US

E: hello@diversiview.online

<https://diversiview.online>

<https://lensell.online/>