

17 August 2022

ASX Market Announcements
ASX Limited
Level 6, Exchange Centre
20 Bridge Street
SYDNEY NSW 2000

“CLIME INVESTMENT MANAGEMENT LIMITED COMPLETES ACQUISITION OF MTIS WEALTH MANAGEMENT & ENTERS INTO A MANAGED ACCOUNTS STRATEGIC ALLIANCE WITH MARCUS TODAY”

- The acquisition of MTIS Wealth Management, announced on 19 May 2022, has completed.
- MTIS has ~\$380 million FUM and total gross annual revenue of ~\$3 million and will form part of the Clime Melbourne office
- CIW has entered into a strategic alliance with Marcus Today, to manage their \$70mil SMA portfolios and provide licensing services. Founded by respected stockbroker Marcus Padley, Marcus Today is an online subscriber stock market newsletter service providing education and general financial market knowledge to Australian investors.
- This acquisition and strategic alliance follow Clime’s recent acquisition of Ralton Asset Management and the strategic alliance with Torica Funds Management

The Board of Clime Investment Management Limited (CIW) is pleased to advise that it has successfully completed the acquisition of MTIS Wealth Management Pty Limited and Investment Strategists Accounting Services Pty Limited (ISAS) (“MTIS”). The MTIS and CIW teams have co-located to create a full-service wealth office in Melbourne. MTIS will leverage the CIW operating infrastructure, risk management and professional wealth services, providing clients with an expanded suite of education and investment solutions.

Following an introduction facilitated by the MTIS Principals, CIW is also pleased to announce a strategic alliance with Marcus Today (MT) to manage MT’s \$70mil managed account portfolios and provide licensing services. The portfolios will be managed by the CIW investment team under the Ralton Asset Management SMA service, led by our CIO, Will Riggall. The strategic alliance will identify and offer mutually beneficial services to the CIW and MT investor communities, including multi-modal education forums, access to stock market and macro insights and professionally managed investment solutions.

The MTIS transaction & strategic alliance with Marcus Today follows CIW’s recent announcements of the acquisition of Ralton Asset Management and the strategic alliance with Torica Funds Management. As previously reported, the platform for this growth and expansion was set by the merger of CIW with Madison Financial Group in June 2020.

Annick Donat
CEO Clime Group

This document is approved by the Board of Directors of CIW for release to the ASX. For enquiries, please contact Annick Donat on 1300 788 568 or via email at info@clime.com.au.

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