

Desktop Broker, DASH & Global X:

Adviser Lunch & Learn 2026

Ryan Davis

**National Sales and Key Accounts Manager,
Desktop Broker**

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State Sales Manager – VIC/NSW

GLOBAL X
by Mirae Asset

desktopbroker >
ROCK SOLID

DASH

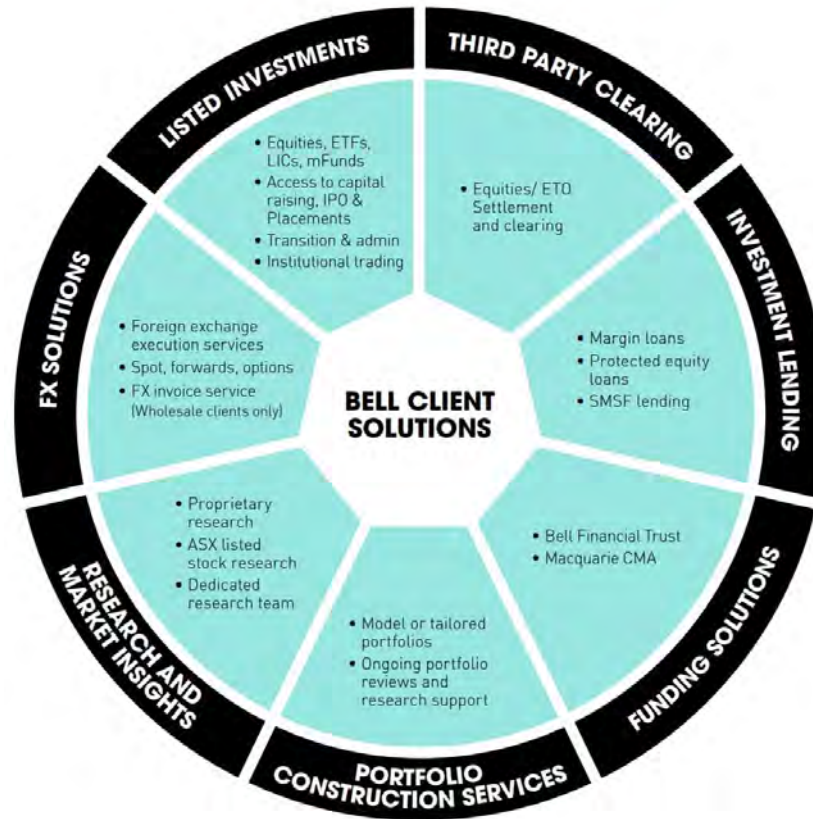
Breadth of Solutions



Find the right solution for your clients with Bell Financial Group

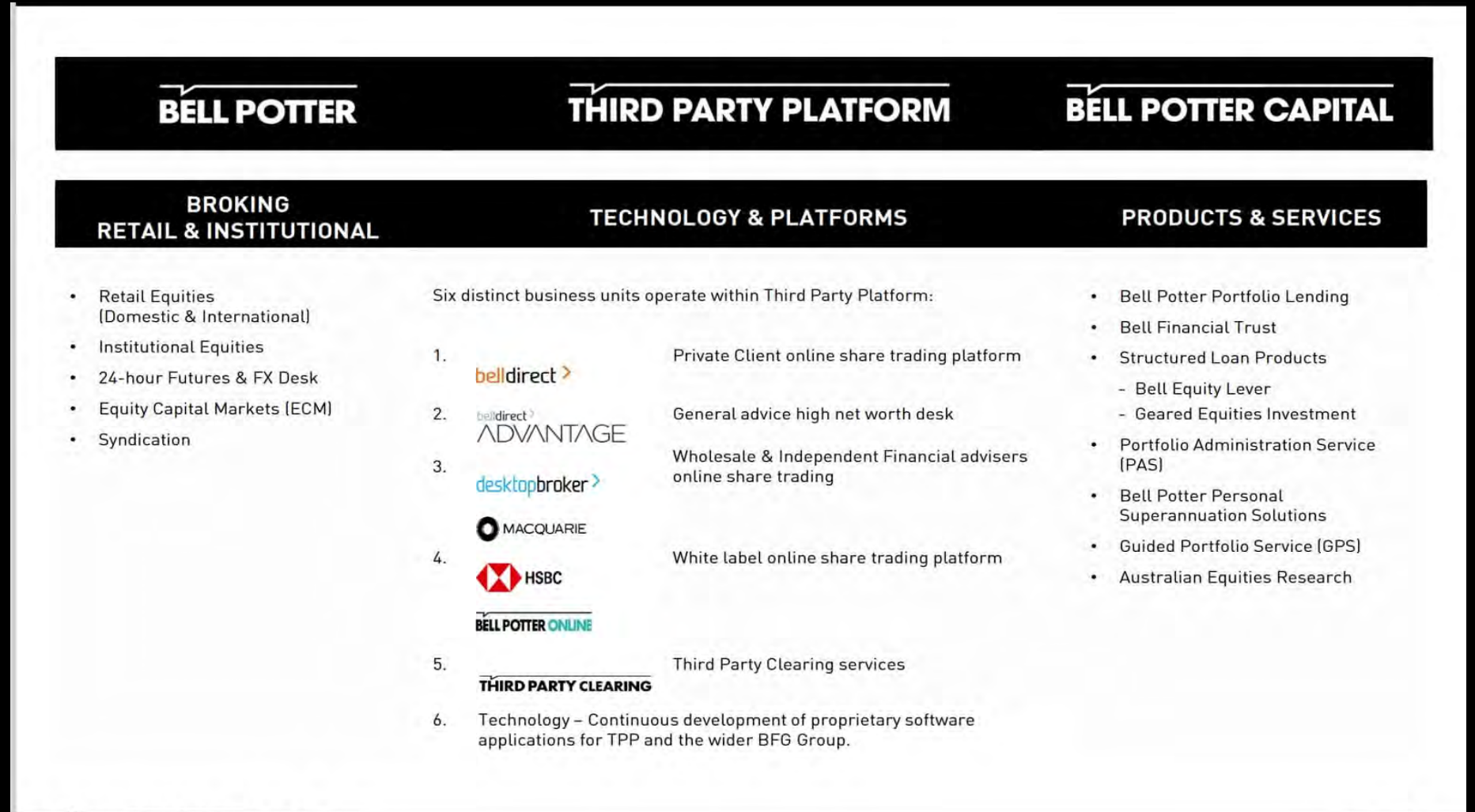
BELL CLIENT SOLUTIONS

Providing direct equity trading, execution, research and lending solutions. Bell Financial Group is Australian owned and listed on the ASX: BFG.



BELL FINANCIAL GROUP

- Australian owned and publicly listed (ASX:BFG)
- \$85B AUM & 580,000 client accounts
- Portfolio Construction service & Access to IPO's
- Direct integration with Bell Potter Capital margin lending products



BELL FINANCIAL GROUP

DESKTOP BROKER

Providing trading services to
over 6000 Australian
financial advisers.



An easy-to-use, low-cost
trading platform for financial
advisers

Access Bell Potter research,
and model portfolios on
individual HINs



Rock Solid
Financial Stability:

Australian owned and
backed by Bell Financial
Group (ASX:BFG)



BENEFITS | WHAT CAN DESKTOP BROKER DO FOR YOU?

Positives:



- Backed by ASX listed Bell Financial Group – strong balance sheet & \$0 net debt
- Access Bell Potter research (ASX top 500, ETF & Hybrids reports)
- Access Bell Potter IPO, Placement & Hybrid deal flow
- DTR support – large trades VWOP into market
- Dedicated Melbourne based trading support team
- Digital client account transitions support
- Long term execution partners & fully integrated with all major data feed Technologies

Best in class:



- The only end to end proprietary trading platform in Australia.
- Flexible role and permission based database structure supports innovation
- Combination of onshore / offshore capability across all functional lines.
- Completely in-house technology team with deep experience in this vertical
- Full suite of Open API's allowing multiple integration options
- Best in market client experience in online broking.
- Australian, Independent, non-institutionally owned.

2026 Outlook



Bell Potter Online

Five key calls for 2026 – how to play these themes via the ASX200

1. Positive Emerging Markets

AMC - Offers value exposure to defensive growth, with Berry merger synergies driving double-digit earnings increases.

CAR – Diversified across regions and vehicle types, allowing diversification across different cycles. Strong US growth story, can duplicate business model in other regions. Investing in AI

2. Rotate to Resources

RIO -Diversifying beyond iron ore with strong copper production growth. Also, exposure to aluminium and lithium

EVN - Leveraged gold and copper exposure. Focus shifting to capital returns. Tier 1 jurisdictions

3. Adding some Value

SHL - SHL returning to earnings growth in FY26 and EBITDA margins to expand.

STO – Normalising capex and major project ramp-ups support accelerating cash flow. Positive risk/reward versus peers.

4. Higher for Longer; Constructive Australian Floating Rate Credit

GMG – Some of the lowest gearing in the sector. Global industrial property group, exposed to structural growth in demand for data centres.

IAG – Benefits from higher investment income, and potential for premium increases in an inflationary environment

5. Stronger A\$ - Hedge global equity exposure

JBH – Benefits from cheaper imports and further market share gains for JB Hi-Fi Australia. The valuation is also now far more reasonable with the stock having de-rated significantly from its highs.

BHP - Exposure to structural growth trends in copper, high quality miner – strong AUD typically coincides with strong commodity demand.

Next steps

Want to open an adviser trading Account?

- Ask us for a new adviser Form



Find the right solution for your clients with Bell Financial Group

Grow your business with Desktop Broker



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- Portfolio Construction service

Grow your business with Desktop Broker



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- Key account team
- Bell Potter Research

GLOBAL X

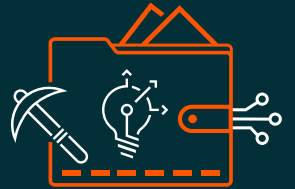
by Mirae Asset

A New Age for Commodities

From Laggard to Leader

May 2026

Global X Management (AUS) Limited | Confidential | All numbers are approximate



For more than a decade, our mission has been empowering investors with unexplored and intelligent solutions.



Founded in the US in 2008, Global X ETFs are now listed throughout Europe, Asia, Canada, Latin America, and Australia.



Global X ETFs is a fully-owned subsidiary of Mirae Asset Financial Group, a global industry leader with 63 offices and over 15,000 employees worldwide. Founded in 1997 as one of Asia's pioneering fund management companies, the Group now oversees over **US\$800bn of total AUM** that includes ETFs, managed funds, real estate, insurance, private equity, and venture capital.²

~\$200bn

in AUM across more than 450 ETF Strategies¹

Primary Listings by Office



United States

109 ETF Listings



Europe

44 ETF Listings



Australia

48 ETF Listings



Latin America

32 ETF Listings
In Brazil & Colombia



Japan

61 ETF Listings



Hong Kong

40 ETF Listings



Canada

146 ETF Listings

¹ As of December 2025. ² As of December 2025.

Commodities: The Hidden Bull Market Investors Are Missing

The Set Up: Commodities Have Been Ignored

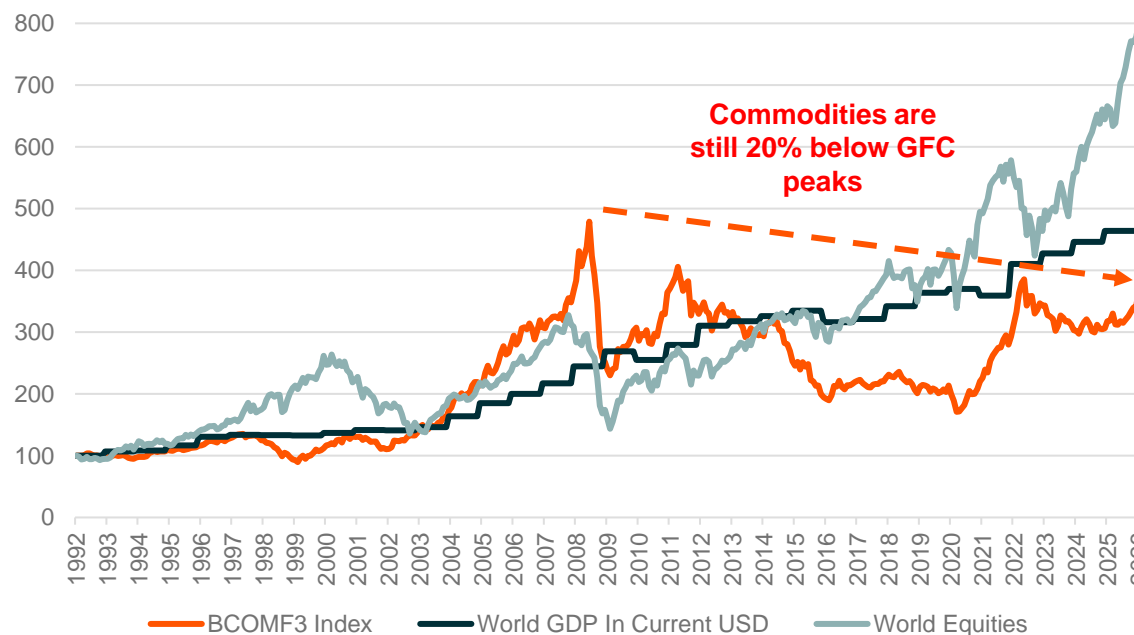
- For the past decade, commodities have been left by the wayside in favour of equity and fixed income.
- Overproduction in early 2000s, lower emerging market demand post GFC, lack of “yield” or “cashflow”, and index investing indoctrination all contributed to the under-investment, underperformance.
- But commodities are a fundamental feedstock of growth, it should eventually mean-revert with global GDP and catch up with equity performance.

Equities to Commodities Ratio Ready for Mean-Reversion



Source: Global X ETFs, Bloomberg. April 2026.

Commodities Have Underperformed Since GFC

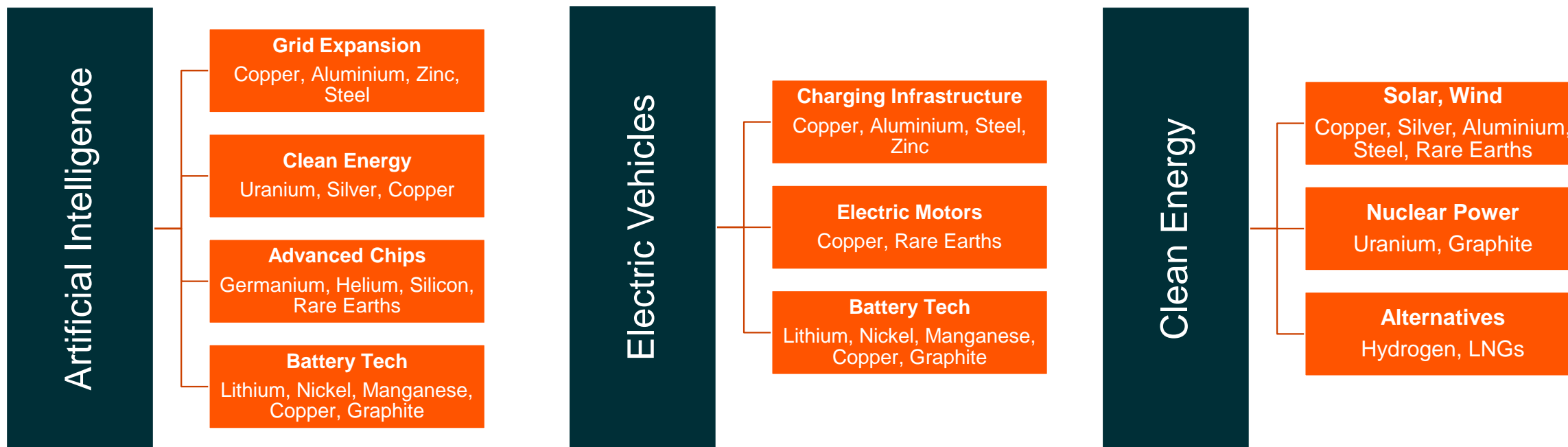


Source: Global X ETFs, Bloomberg, World Bank. March 2026. Rebased to 100 at January 1992.

Megatrends Driving Demand

- At the same time, global megatrends such as AI, clean energy, electrification (including EVs), etc. are transforming cyclical demand into structural bid.
- Artificial intelligence is often thought of as a software/hardware play – semiconductors, chatbots, agents etc.
- It’s actually the “widest” *commodity* megatrend in history with demands for grid expansion, clean energy, battery technology, exotic materials and more.

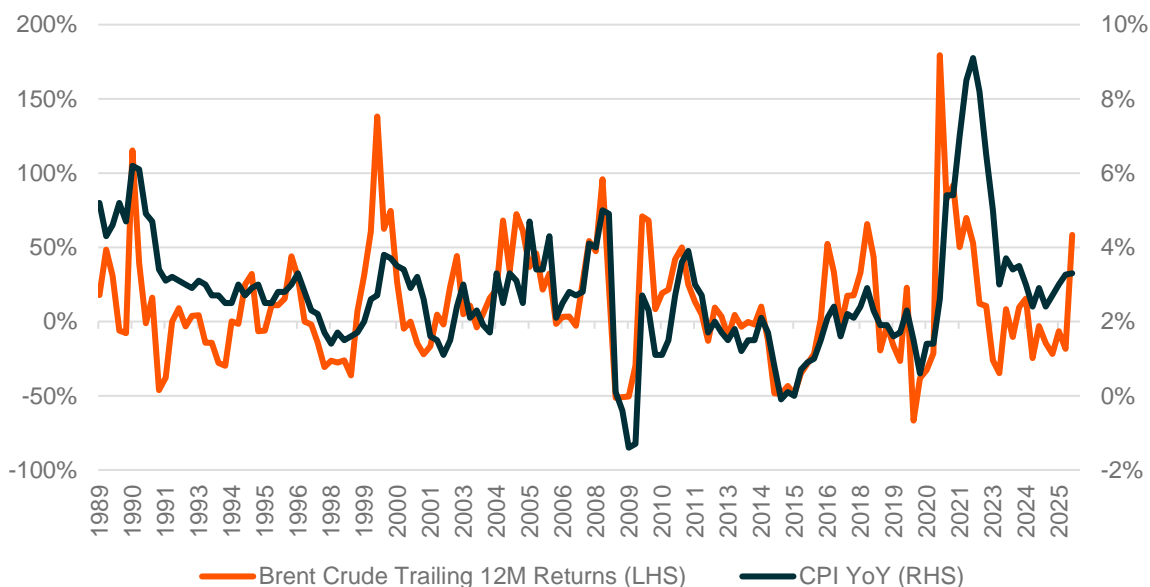
The Material Demands of Current Megatrends



The Catalyst: Iran War

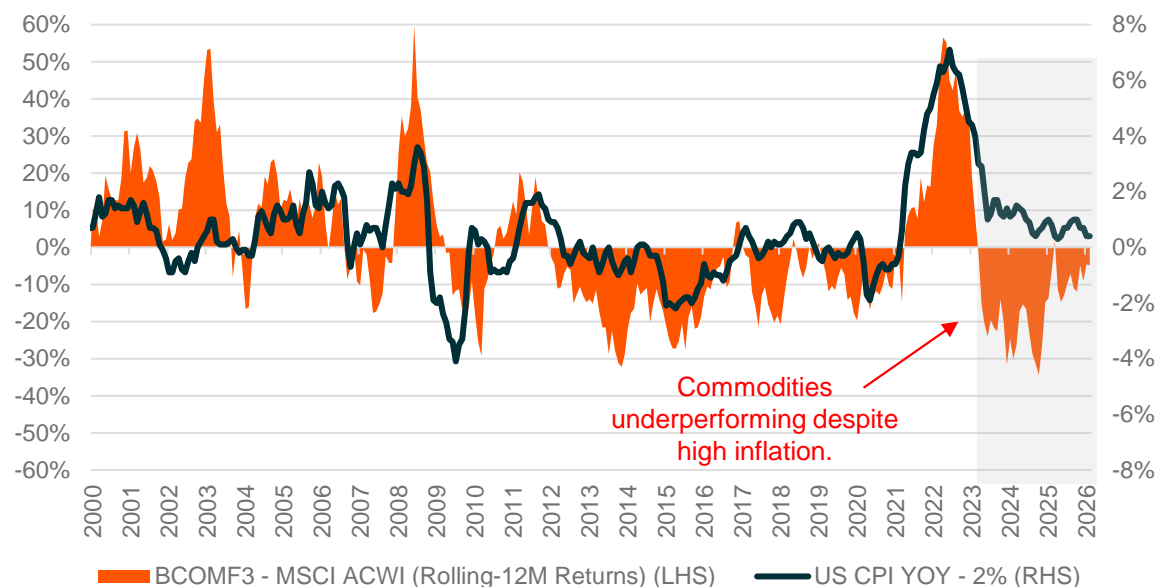
- The Iran War provides tailwinds for commodities as inflation concerns return and supply is constrained.
- Crude oil is the number one contributor to movements in inflation. It is a feedstock of everything from electricity to agriculture to metals.
- Supply-led inflationary environments are positive for commodities, negative for equities. Higher inflation can translate to higher interest rates, and finally to higher cost-of-capital.
- Combined with supply risk, megatrend bid, are we in for a super-cycle?

Crude Oil Prices Are Strong Indicator of Inflation



Source: Global X ETFs, Bloomberg. March 2026.

Commodities Tend to Outperform Equities When CPI > 2%



Source: Global X ETFs, Bloomberg, World Bank. March 2026. Rebased to 100 at January 1992.

Ways to Gain Exposure

Global X Gold Suite



	Global X Physical Gold	Global X Gold Bullion ETF	Global X Gold Bullion (Currency Hedged) ETF
ASX Code	GOLD	GXLD	GHLD
MER	0.40% p.a.	0.15% p.a.	0.35% p.a.
AUM	\$6.4 billion	\$649 million	\$306 million
Custodian/Vault	J.P. Morgan London	J.P. Morgan London	J.P. Morgan London
Currency Hedged	No	No	Yes
Benchmark	Gold Spot Price	Solactive Gold Spot London Close Index	Gold Spot Price
Physical Redemption	Yes	Yes	No
Exposure	Physical	Physical	Physical
Inception Date	March 2003	April 2024	November 2024

BCOM | Fund Information

Global X Bloomberg Commodity Complex ETF (BCOM)

ASX Code	BCOM
MER	0.66% p.a.
AUM	\$70 million
# of Holdings	27
Distribution Freq.	Annual
Rebalance Freq.	Annual
Weighting Scheme	Multifactor
Benchmark Index	Bloomberg Commodity Index 3 Month Forward

- Provides access to a basket of commodity futures ranging from precious metals, industrial metals, energy, agricultural goods, softs and more.
- To express conviction on broad based commodity price appreciation, hedge against inflation, or as a diversifier to traditional assets such as equities & fixed income.



BCOM

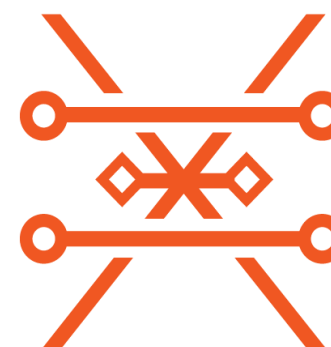
Global X Bloomberg
Commodity Complex ETF

WIRE | Fund Information

Global X Copper Miners ETF (WIRE)

ASX Code	WIRE
MER	0.65% p.a.
AUM	\$795 million
# of Holdings	48
Distribution Freq.	Semi-annually
Rebalance Freq.	Semi-annually
Weighting Scheme	Adj. Market Cap Weighted
Benchmark Index	Solactive Global Copper Miners Total Return Index

- Provides access to a global basket of copper miners which stand to benefit from being a key part of the value chain in technology, infrastructure and clean energy.
- To express a pure-play, medium to long term view on demand for copper as a crucial commodity for a range of growing industries.



WIRE

Global X Copper Miners ETF

ACDC | Fund Information

Global X Battery Tech & Lithium ETF (ACDC)

ASX Code	ACDC
MER	0.69% p.a.
AUM	\$757 million
# of Holdings	46
Distribution Freq.	Annual
Rebalance Freq.	Semi-annually
Weighting Scheme	Equal Weight
Benchmark Index	Solactive Battery Value-Chain Index

- Provides access to a global basket of companies across the battery tech and lithium value chain – ranging from EV manufacturers, battery makers, and lithium producers.
- To express a pure-play, medium-to-long term view on demand for battery technology and lithium as a crucial element of global energy transition.



Are you leveraging technology to run the business you want?

Shannon Brown
DASH Technology Group

The average professional spends 28% of their workday on email and 20% looking for information. — McKinsey Research

Technology isn't just a convenience anymore — it's a competitive advantage and a quality-of-life multiplier.

Your home is running itself

Smart devices, automation, and AI assistants are turning the home into a low-maintenance, high-comfort environment.

Smart Thermostats

Auto-adjust heating & cooling. Save up to 23% on energy bills with zero manual effort.

Robot Vacuums

Floors cleaned daily on schedule. Reclaim 3+ hours of cleaning time per week.

Voice Assistants

Shopping lists, timers, reminders — hands-free. The kitchen becomes a command centre.

Smart Appliances

Washing machines that run off-peak. Ovens preheated remotely. Dishwashers on a schedule.

Automated Lighting

Motion sensors, sunrise simulation, and scenes set the mood without a single switch.

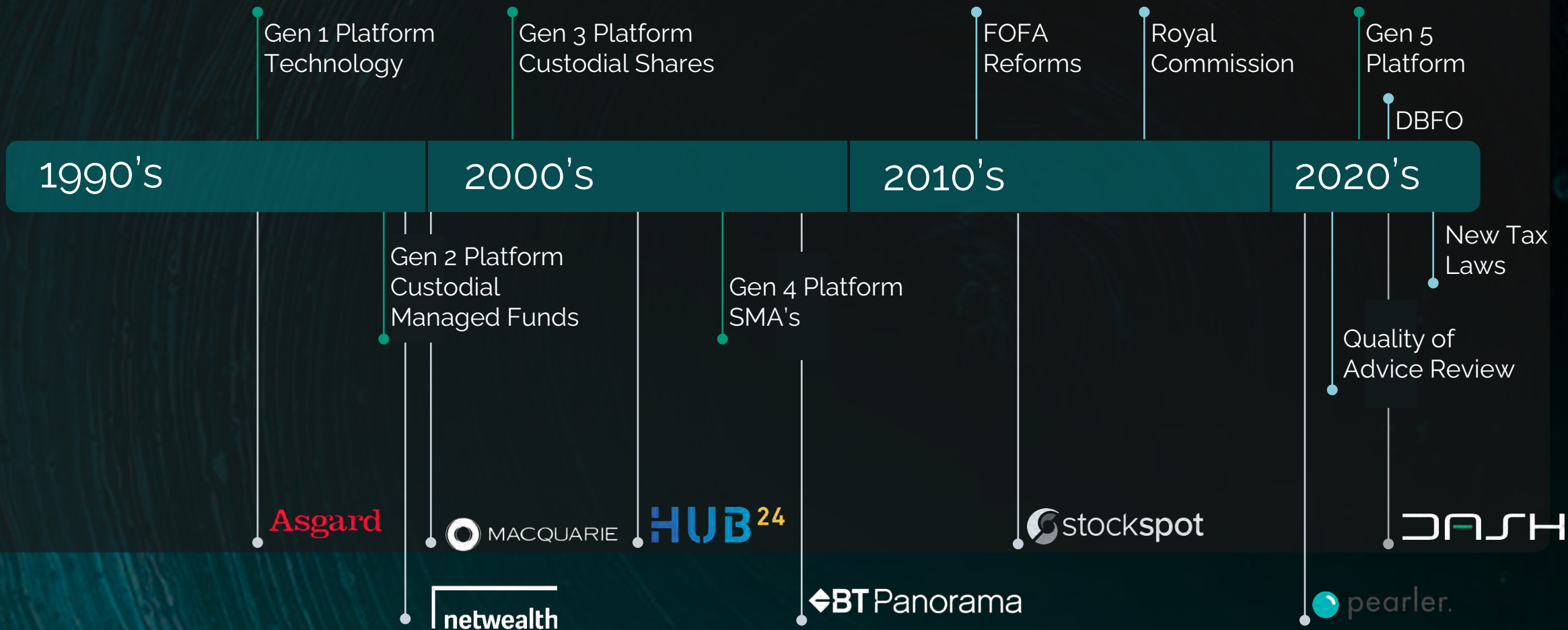
Home Security

Remote monitoring, smart locks, and doorbell cameras — managed from your phone.

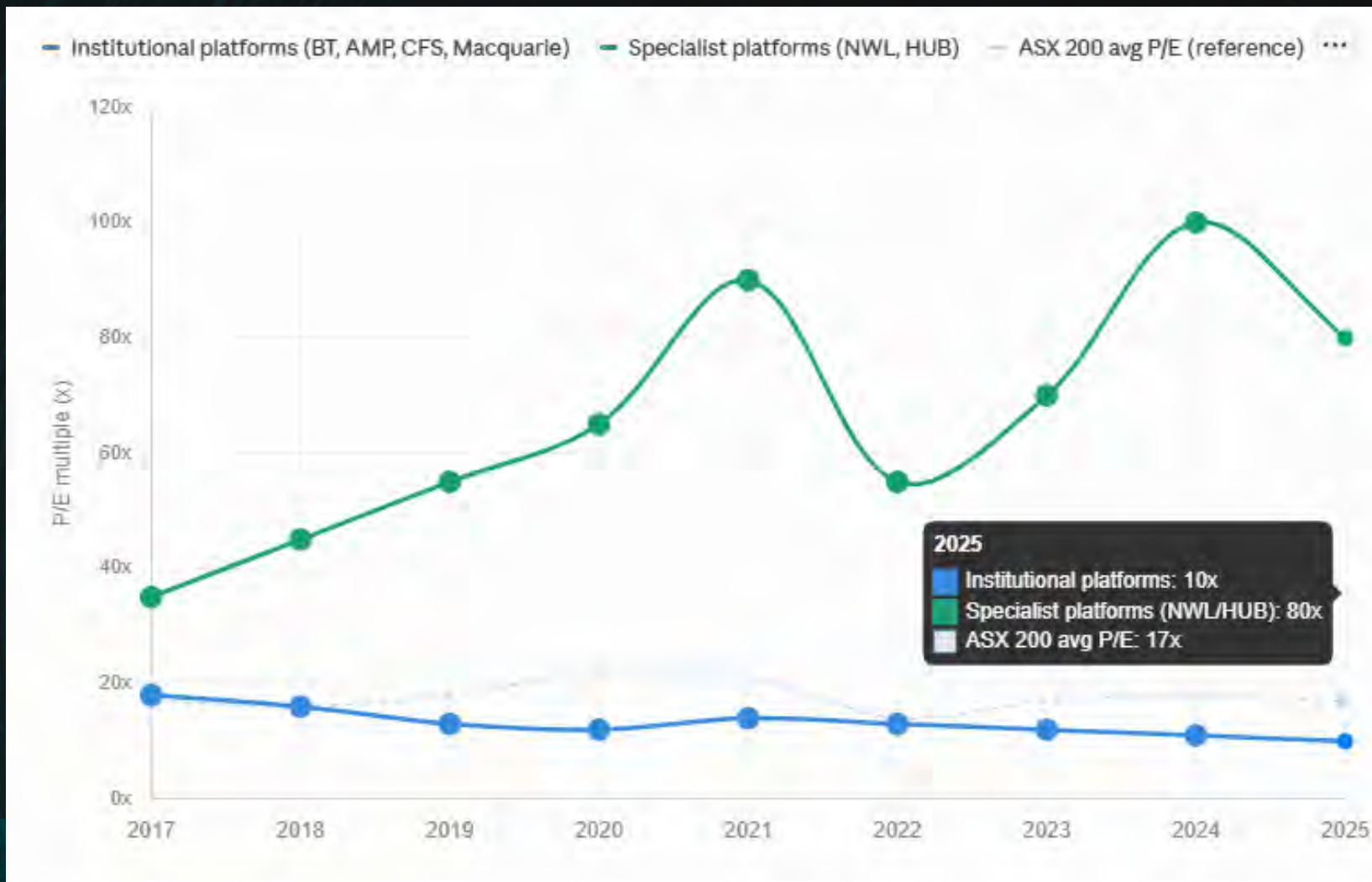
What does a connected ecosystem look like?



Platform Industry Innovation



What multiple is your advice business trading at?



Note: Institutional multiples are estimated from embedded divisional valuations, M&A transactions, and broker reports. Specialist multiples are sourced from ASX-listed NWL and HUB data. All figures are indicative P/E multiples. Ranges reflect point-in-time estimates; actual traded multiples varied by company and reporting period.

Your Investment Universe



CASH



IM MODELS /
MANAGED PORTFOLIOS

Create your own or
choose a model manager



>500 MANAGED FUNDS



BROKER ACCOUNT(S) - ASX
LISTED SECURITIES



TERM DEPOSITS & AT
CALL ASSETS



UNLISTED ASSETS

Alternative Assets, Real Estate,
Collectables,
Cars, Physical Gold



OUTSOURCED ADMIN AND
REPORTING

DASH Administration and
Reporting Services

Let your investment tech do the lifting

- Choose a model manager or build a collection of models
- Select a service management to suit
- Apply client rules for individual client best interests, tax parcel treatment, constraints
- Automate that which can be

Overview

NAME: BL Investment Portfolio Balanced

SERVICE TYPE: Managed Discretionary Account (MDA)

INCEPTION DATE: 10/06/2026

PRIMARY BENCHMARK: The S&P/ASX Blended Equity and Bond - Balanced Index

SECONDARY BENCHMARK: S&P/ASX 300 Accum Index

CLIENT PORTAL BENCHMARKS: S&P/ASX 300 Accum Index, Consumer Price Index: All Groups

MINIMUM TRADE VALUE: 1000

APPLY 45 DAY RULE? APPLY 1 YEAR RULE?

Rebalance type: Monthly, Quarterly, Bi Yearly, **Annual**

DASH

Home Accounts Entry Manager Investments Order Reports

MODELS STRATEGIES

Models

Model Search SEARCH TOGGLE VIEW

1 - Demo Conservative Model

1 MONTH RETURN: 0.00%

1 - Model example

1 MONTH RETURN: 0.00%

1ND Growth Model

1 MONTH RETURN: 0.00%

NAB.ASX National Australia Bank
 CBA.ASX Commonwealth Bank
 MacqBankCMA.ADI Macquarie Bank CMA
 BHP.ASX BHP Group Ltd

Constraint Settings

View and update the configurations that dictate order and rebalance behaviours.

Security Constraints

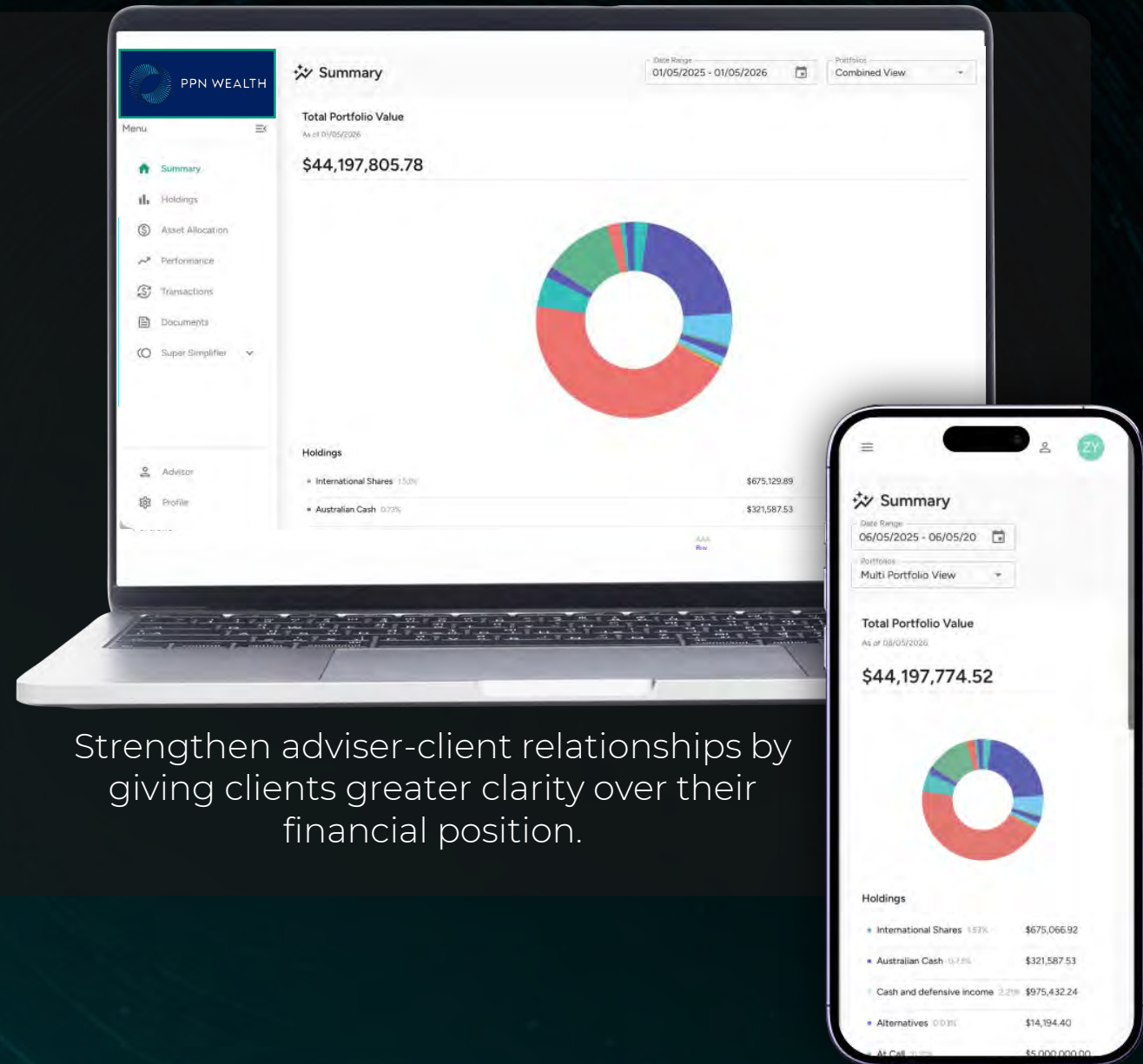
CONSTRAINT	TYPE	BEHAVIOUR	SUBSTITUTED SECURITY
iShares S&P MidCap 400 - IJH.ASX	Do Not Buy	Substitute	Global X Nasdaq 100 Covered Call Comple...
Global X Defence Tech ETF - DTEC.ASX	Do Not Sell	Pro Rata	none

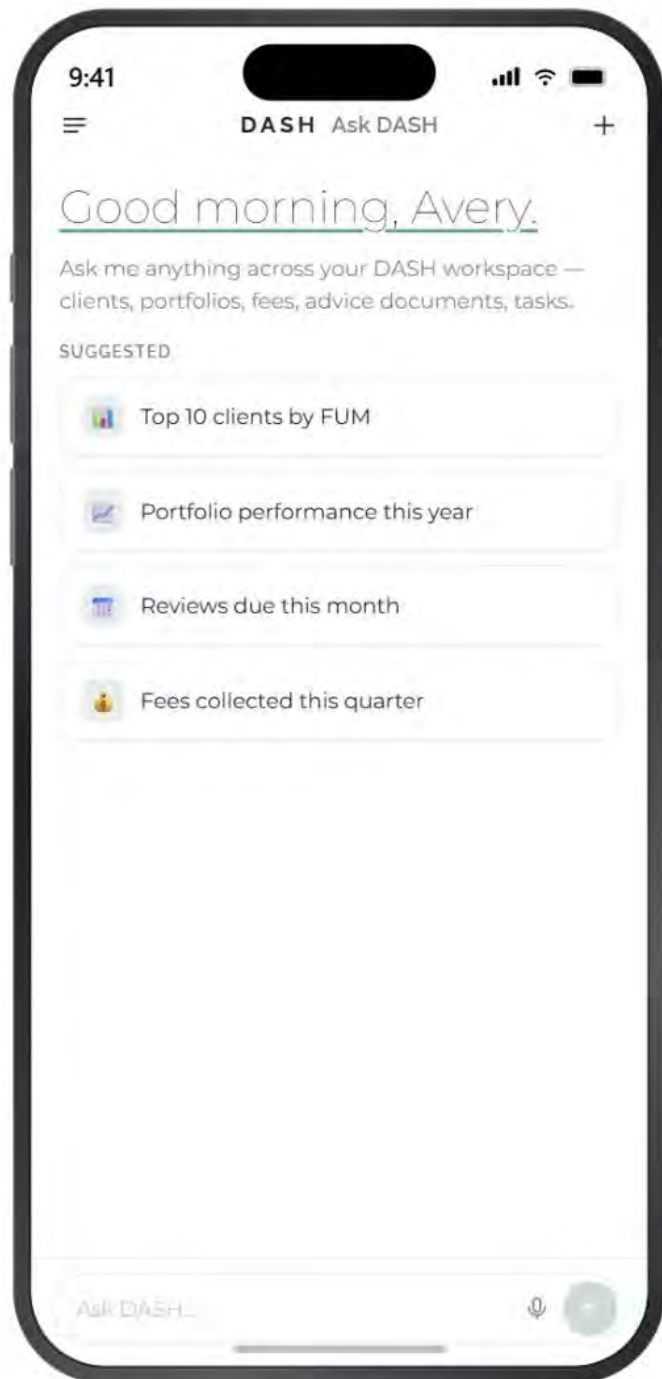
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Client expectations are shifting

Modern clients expect clarity, access and confidence across every touchpoint.

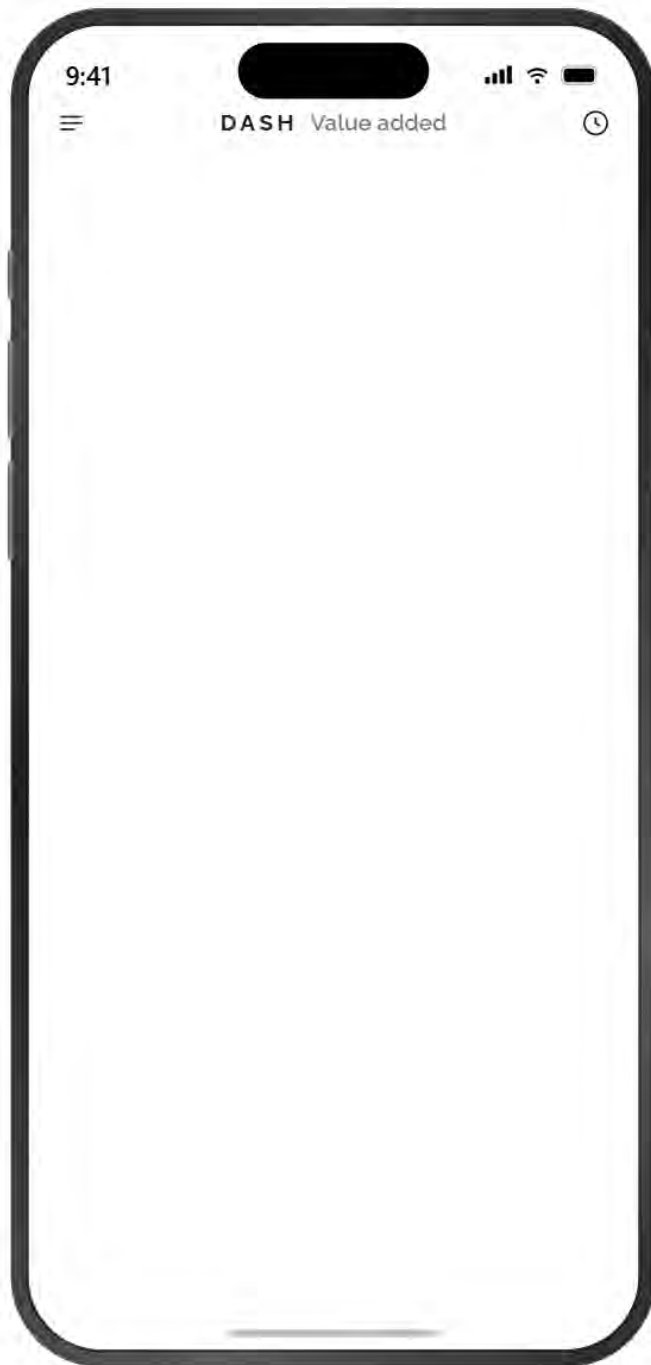
- Secure real-time access
- Portfolio and performance visibility
- Documents and reporting in one place
- Desktop and mobile accessibility
- A streamlined digital experience





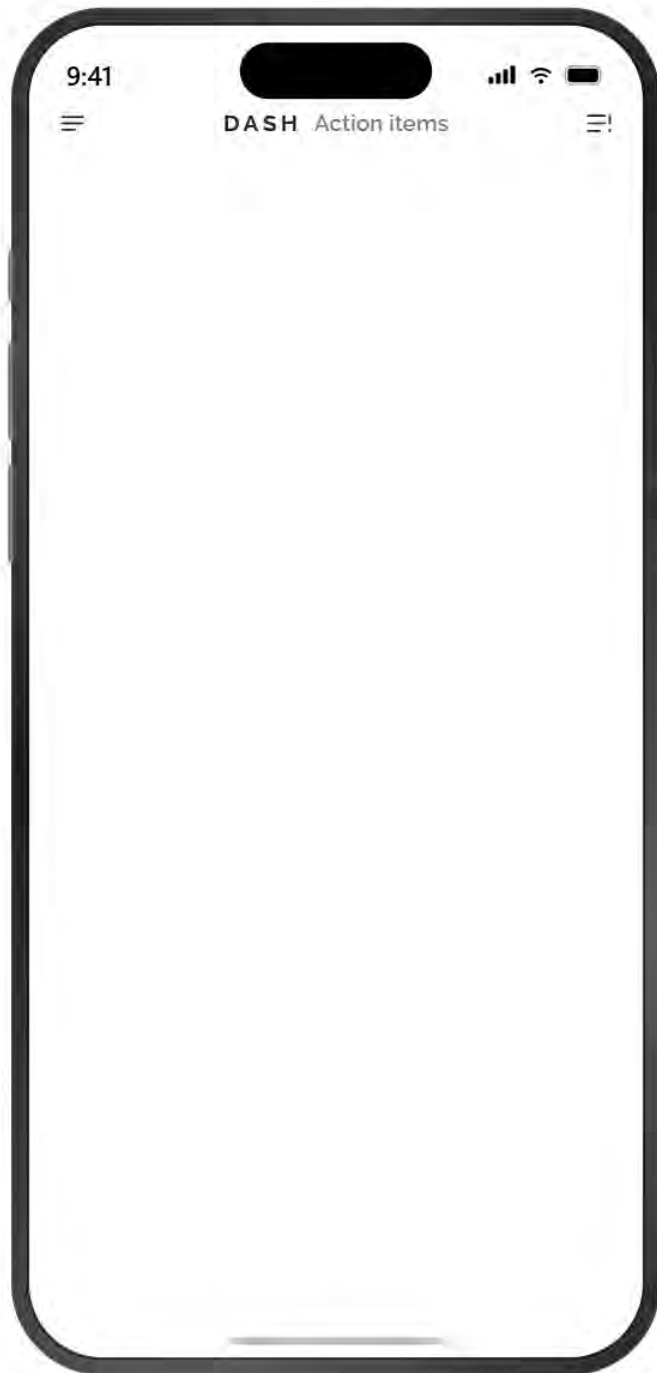
Innovation is in DASH's DNA — leading financial advice technology since day one

- AI unlocks the next leap: more time, lower cost, greater client capacity for Australian advisers



Innovation is in DASH's DNA
— leading financial advice
technology since day one

- AI unlocks the next leap: more time, lower cost, greater client capacity for Australian advisers
- Measure time saved across every workflow



Innovation is in DASH's DNA
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technology since day one

- AI unlocks the next leap: more time, lower cost, greater client capacity for Australian advisers
- Measure time saved across every workflow
- Track actions and outcomes in real time

Thank you

Discover how DASH can help you deliver better advice, more efficiently.

Get in touch to learn more

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