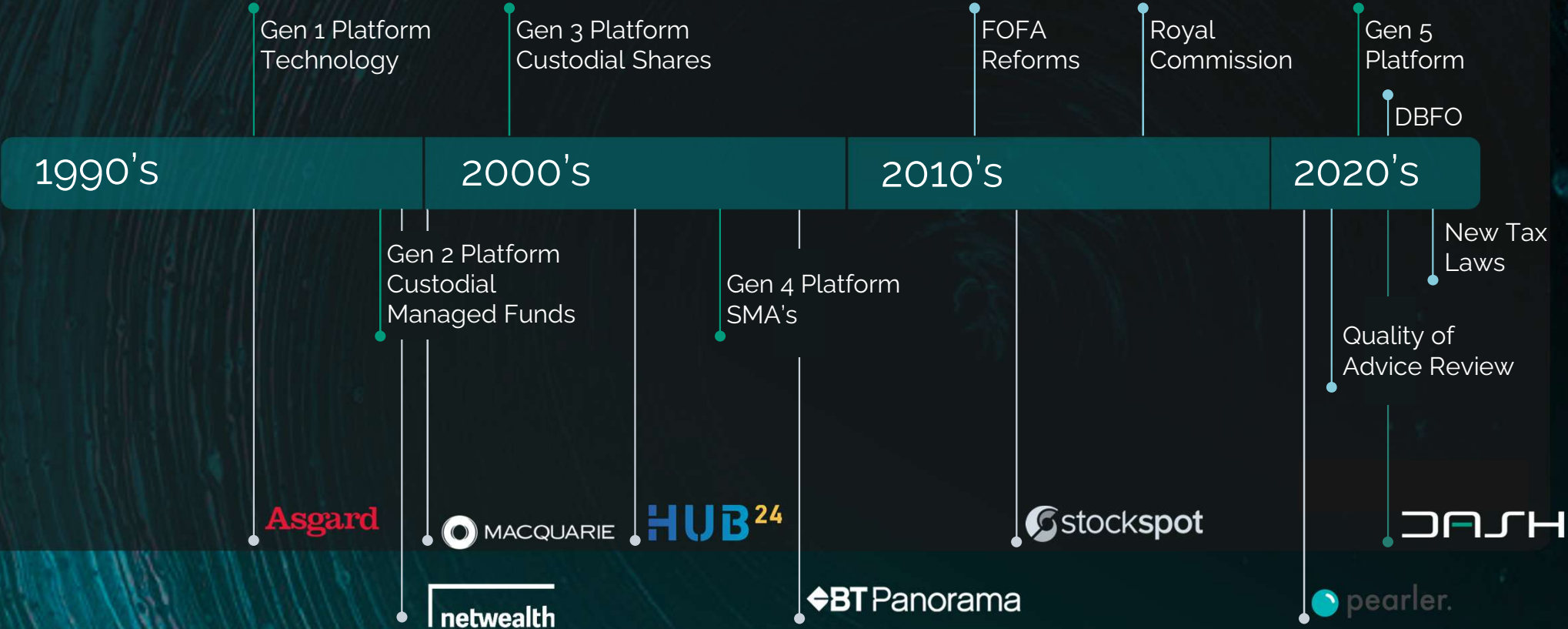


# The Emerging Shape of Managed Accounts

Peter Panigiris, DASH

DASH

# Industry Innovation



**Traditional advised  
portfolios rely  
heavily on:**

Manual trades

Model replication

Individual client execution

**Future platform  
access to include:**

Direct indexing

Private markets

Global multi-currency  
investing

Thematic and outcome-  
based portfolios

Digital and hybrid advice  
models

**DASH**

## Managed Discretionary Accounts (MDAs) shift advice from:



**Transaction-based  
implementation**



**Professionally  
governed portfolio  
management**

The future isn't more products — it's better portfolio delivery, powered by MDAs

DASH

