

Dimensional Investing is about implementing the great ideas in finance for our clients.

DIMENSIONAL GLOBAL FIRMS* AT A GLANCE

As at 31 March 2019

37

Years since founding

25

Years in Australia

In firmwide

The Randomness of Global Equity Returns

You don't have to be an expert in every region to benefit from the opportunities those regions represent. A well-structured portfolio can help capture returns where and when they occur.

[Learn More](#)



01

An enduring belief in the
POWER of MARKETS

**Capital Markets Have Rewarded
Long-Term Investors**

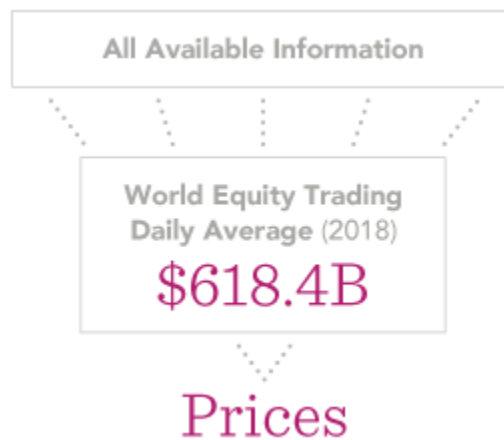
Growth of \$1 AUD, Jan. 1985–Dec. 2018



Rather than attempting to predict the future or outguess others, we draw information about expected returns from the market itself—leveraging the collective knowledge of its millions of buyers and sellers as they set security prices.

[Learn More](#)

EMBRACE MARKET PRICING



The market is an effective information-processing machine. Market participants buy and sell securities millions of times per day in the world markets. The real-time information they bring helps set security prices.



DAVID BOOTH

Founder and Executive Chairman

“The number of managers that can successfully pick stocks are fewer than you’d expect by chance. So, why even play that game? You don’t need to.”



02

Applying insights from
FINANCIAL SCIENCE

Breakthroughs in Modern Finance

Tomorrow

Dimensional was built around a set of ideas bigger than the firm itself. With a confidence in markets, deep connections to the academic community and a focus on implementation, we go where the science leads, and continue to pursue new insights, both large and small, that can benefit our clients.

Today

2012 **PROFITABILITY**

1992 **VALUE BREAKTHROUGH**

1981 **SMALL CAP INVESTING**

1973 **INTERTEMPORAL CAPM**

1966 **EFFICIENT MARKET HYPOTHESIS**



Dimensional's investment approach is grounded in economic theory and backed by decades of empirical research.

Our internal team of researchers works closely with leading financial economists to better

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THE EVOLUTION OF INDEXING AND DIMENSIONAL



EUGENE FAMA

Nobel laureate, 2013 Professor, University of Chicago; Dimensional Director; Consultant, Dimensional Fund Advisors LP

“We’re very careful in looking at new research that comes along and making sure it’s robust.”

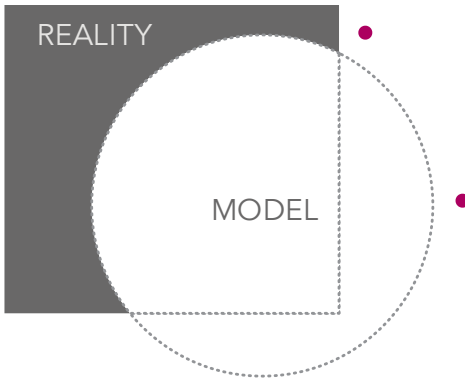


Understanding what drives returns is the starting point. From here, we focus on fine-tuning our method of capturing them.

We structure broadly diversified portfolios that emphasise the dimensions of higher expected

[Learn More](#)

**THE GAP BETWEEN REALITY
AND A MODEL**



Academic models provide useful insight, but they are incomplete. It's in the gap between reality and a model where sound judgment and experience matter.



Watch

Dimensional Stories: Models
(03:07)



GERARD O'REILLY

Co-Chief Executive Officer and Chief Investment Officer

“The nuance and expertise is where you take knowledge and information and implement it in a real test, not in the backtest.”

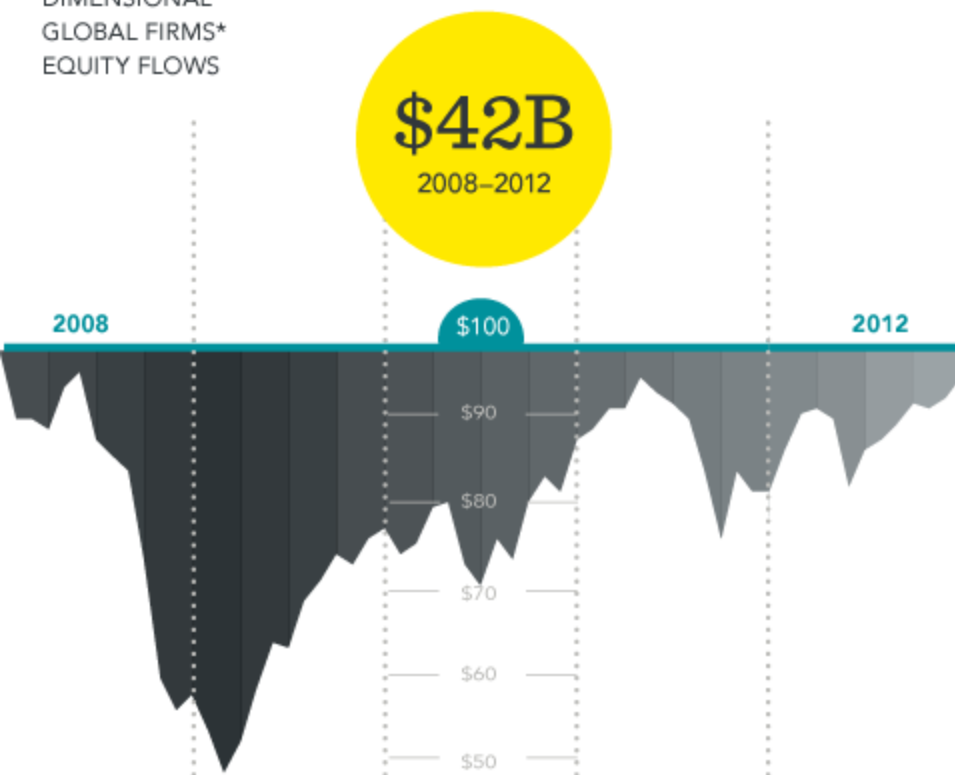


A commitment TO OUR CLIENTS

The Global Financial Crisis and Its Aftermath

A key to a good long-term investment experience is being able to stay with your investment philosophy, even during tough times. During the rocky 2008–2012 period, many investors sold their equity funds. Within the Dimensional Global Firms*, equity funds had inflows throughout the period, which could suggest that in aggregate investors were prepared to withstand the market's movements in order to pursue long-term results.

DIMENSIONAL
GLOBAL FIRMS*
EQUITY FLOWS

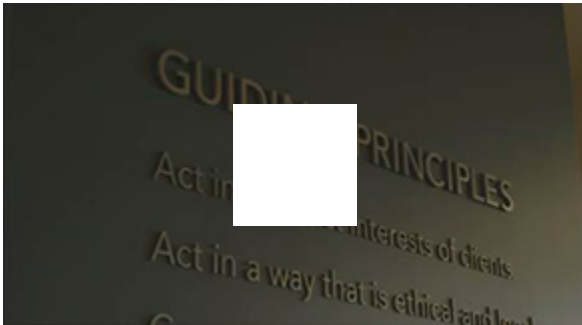


TRACKING A \$100 INVESTMENT IN
GLOBAL EQUITIES (MSCI World Index)



[Learn More](#)

AT THE HEART OF DIMENSIONAL INVESTING



DAVE BUTLER
Co-Chief Executive Officer

“The client experience has always been, and will continue to be, why we do what we do.”

*“Dimensional Global Firms” refers to the Dimensional separate but affiliated entities generally, rather than to one particular entity. These entities are Dimensional Fund Advisors LP, Dimensional Fund Advisors Ltd., DFA Australia Limited, Dimensional Fund Advisors Canada ULC, Dimensional Fund Advisors Pte. Ltd., Dimensional Ireland Limited, Dimensional Japan Ltd., and Dimensional Hong Kong Limited. Dimensional Hong Kong Limited is licensed by the Securities and Futures Commission to conduct Type 1 (dealing in securities) regulated activities only and does not provide asset management services.. Dimensional Directors refers to a member of the Board of Directors of the general partner of Dimensional Fund Advisors LP.

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