



EXPAND

Expand Functionality – Buy, sells and reweights

February 2026
myexpand.com.au

Investments: Select client account

- 1 Select the account you wish to make a switch, trade or reweight to, by searching the account name or number using **Your clients**.

This section provides a way to look at your entire client list and utilise categories to filter your clients for reports and extracting data based on the search criteria.

The screenshot displays the EXPAND platform dashboard. At the top, there is a navigation bar with tabs for 'Home', 'Activity', and 'Your clients'. A search bar is located on the right side of the navigation bar. The main content area features a blue header with the text 'Good afternoon, John'. Below this, there is a 'Recent updates' section on the left, followed by a grid of six functional tiles: 'Your clients', 'Activity', 'New application form', 'Recent reports', 'Investment explorer', and 'Platform guides'. A green circle with the number '1' is positioned over the 'Your clients' tile, with an arrow pointing to it from a larger green circle with the number '1' located above the navigation bar. The background of the dashboard is a scenic image of a hot air balloon over a green landscape.

Buy/Sells

2 From the Summary page, navigate to the Investments page. Here you can toggle between a Portfolio or a Consolidated view.

The Portfolio view shows the investments held within the account, as a dollar and percentage. It categorises them by investment type i.e., Cash Account, Managed Portfolio Service, Separately Managed Accounts (SMA), Managed Investments, Listed Investments and Maturing Investments.

The Consolidated view displays a consolidated view of the investments held within the account, including the underlying investments in a MPS and SMA. It categorises them by investment type i.e., Cash Investments, Managed Investments, Listed Investments and Maturing Investments.

Please note that trading is disabled in the consolidated view.

3 To sell or purchase additional units of existing asset holdings from available cash, select the **Buy** or **Sell** button on the right of each investment.

4 To buy a new managed investment, listed or maturing investment from available cash, select the investment from the relevant drop-down list by entering the name or code. Enter the amount to invest and select the **Add** button.

Buy and sells occurs simultaneously which will allow you to use the proceeds of a sell immediately to buy an investment.

The screenshot displays the 'Investments' page in a 'Portfolio' view. The navigation bar includes 'Summary', 'Account details', 'Investments', 'Transactions', 'Fees', 'Insurance', 'Beneficiaries', 'Move money', and 'Reports'. The 'Investments' section is active, showing a toggle for 'Portfolio' (selected) and 'Consolidated'. The main content area is organized into sections: 'Cash Account' (Amount available to invest: -\$975.49, Investment performance: 3.85%, Current value: \$93.49, Current % of portfolio: 0.1), 'Managed Portfolio Service' (You have no managed discretionary account holdings), 'Separately Managed Accounts' (You have no separately managed account holdings), and 'Managed investments' (MLC WS Index Plus Balanced Portfolio, Investment performance: 4.04%, Current value: \$106,805.36, Units: 92,960.72, Unit price: \$1.1489, Price date: 24/11/2023, Current % of portfolio: 99.9). The 'Buy' and 'Sell' buttons for the MLC WS Index Plus Balanced Portfolio are highlighted with a red box and a callout '3'. The 'Add a new managed investment' section is highlighted with a red box and a callout '4'. The 'Portfolio' and 'Consolidated' tabs are highlighted with a red box and a callout '2'.

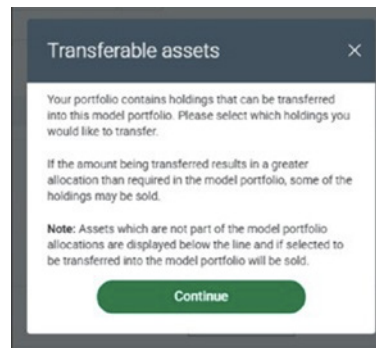
Buys/Sells (cont.)

For SMAs

Buying into a new SMA

- 5 Input the amount from available cash to invest in the SMA and select **Add**.
- 6 Where available, you will have the option to transfer current portfolio holdings into the SMA.

You can either transfer 100% of the holding value or you can specify a dollar amount.



Minimum investments for SMAs

The minimum initial investment is different for each Model Portfolio. For minimum initial investment refer to the individual SMA PDS.

There is no minimum for additional investments in a SMA model portfolio.

Separately Managed Accounts

You have no separately managed account holdings

Selected investment
SMA Antares Dividend Builder (NUN0052AU) 🗑️

Holdings available to transfer	Value of units No. of units	Transfer into model	Estimated value to be transferred
Cash Amount available to invest	\$288,020.04	\$ <input style="width: 80px;" type="text"/> <input type="checkbox"/> All	\$0.00
BHP Group Limited BHP	\$101,354.50 2,515 @ \$40.3000 per unit	\$ <input style="width: 80px;" type="text"/> <input type="checkbox"/> All	\$0.00 0 units
The below assets are not part of the model portfolio's allocation and will be sold if selected			
Woodside Energy Group Ltd WDS	\$5,607.95 295 @ \$19.0100 per unit	\$ <input style="width: 80px;" type="text"/> <input type="checkbox"/> All	\$0.00 0 units
Total amount			\$0.00 Cancel Add

Buys/Sells (cont.)

Buying, selling, or transferring out of an existing SMA

- 7** Input the amount you wish to buy or sell and select **Add**.

There is a maximum redemption value for partial SMA sells. This amount will be shown when you input an amount. For partial sells, the cash will be deducted from SMA cash and will be made available. Once cash is transferred out of SMA cash, a SMA model rebalance is triggered.
- 8** To sell the total balance of the SMA and its underlying assets, select the **All** tick box. This will then transfer the proceeds to SMA model cash which will then be transferred to cash on platform.
- 9** To transfer out of the SMA model, you can select to **Unlink** your SMA, which is available on the ellipses menu button next to Sell. This will transfer (in-specie) the underlying assets to platform, no investments are sold when you unlink. Available cash and the listed investments will be available immediately. From here you can then follow the steps above to proceed with the sell. **Note: This option is not available for Expand Essential accounts.**

The image shows two screenshots from a financial application. The top screenshot displays the SMA details for 'SMA Perennial Value Shares for Income' (NUN0053AU) with a 0.88% yield and a value of \$31,737.22. A dropdown menu is open, showing 'Buy', 'Sell', and an ellipsis menu button. The 'Unlink' dialog is visible, with the 'All' checkbox selected and the 'Add' button highlighted. A green circle with the number 7 points to the 'Add' button, and a green circle with the number 8 points to the 'All' checkbox. The bottom screenshot shows the 'Exiting the model?' dialog box with the 'Unlink' button highlighted. A green circle with the number 9 points to the 'Unlink' button.

Buys/Sells (cont.)

10 Once all Buys and Sells have been entered, click on the **Review order** button to proceed. You will also have the option to save or delete the draft order.

Any saved draft orders can also be found under the Activity Monitor on your adviser dashboard.

Portfolio	Consolidated	Investment performance (%) ?	Current value ?	Units	Unit price (\$)	Price date	Current % of portfolio	Buy	Sell	
✓ NUN0054AU		1.98%	\$36,474.18				5.3	Buy	Sell	⋮
Pending transactions total -\$4,466.66										
✓ SMA JBWere Income	JPL0001AU	1.52%	\$41,075.92				5.9	Buy	Sell	⋮
Pending transactions total \$254.74										
✓ SMA Perennial Value Shares for Income	NUN0053AU	0.88%	\$31,737.22				4.6	Buy	Sell	⋮
SMA MLC Premium High Growth 98 NUN8186AU										
								Draft transfer \$73,800.50		Edit Delete
Add a new SMA investment										
⊕ Start typing a name or code... ▼										
Managed investments										
Ausbil Australian Active Equity Fund	AAP0103AU	4.10%	\$24,598.91	6,325.5782	3.8888	10/03/2024	3.5	Buy	Sell	
BlackRock Global Allocation Fund (Aust)	MAL0018AU	4.73%	\$24,732.77	21,803.28	1.1344	24/11/2023	3.6	Buy	Sell	
Your draft order										
Buys (1)		Sells		Transfers (1)		Cash impact				
-\$50,000.00		\$0.00		\$23,800.50		-\$50,000.00		Delete draft Save draft Review order		

10

Buys/Sells (cont.)

11 The **Review and confirm** side panel will display the impact of the switch instruction for review. Also, the order instructions can be downloaded by selecting the **Download order instruction pdf** link. Panel will appear and show buys and sells for the transaction. To submit the instruction, enter your password and click on **Submit Order**.

12 When the order has been submitted, the order confirmation can be downloaded by selecting the **Order documentation** link. At this window panel, you can change standing instructions if required.

11

Review and confirm [Download order instruction pdf](#)

Net cash movement [?] **-\$50,000.00**

Total brokerage **\$0.00**

Holding	Units	Unit price (\$)	Impact (\$)
Separately managed accounts			
<input checked="" type="checkbox"/> SMA MLC Premium High Growth 98 <small>NUN8186AU</small>	73,800.50		

[Save draft](#) [Show](#) **Submit order**

Your order has been submitted

Please note changes to your investment holdings do not automatically update your Standing Instructions. You can change your Standing Instructions via the Investments page or using the buttons below:

[Deposit Instruction](#)
[Cash Account Preferences](#)
[Income Preference](#)

Order documentation

[16829881_order_confirmation.pdf](#)

EXPAND Extra

Order Confirmation

Address: **M & S O'Shea Super Fund**
(Rodgers Family Superannuation Fund)
Mr Greg Pateamo Brye 16829881

Net Cash Movement **-\$50,000.00**

Date/Time: 20 Mar 2024 09:41 AM
 Tax optimisation method: First in first out

Separately Managed Accounts	Trans. Type	Order Type	Units	Unit price \$	Brokerage \$	Impact \$ (inc. costs)	Estimated assessable net gains/loss \$
SMA MLC Premium High Growth 98 <small>NUN8186AU</small>	SMA buy	Dollars	-	-	-	-\$73,800.50	-
Cash Account	SMA transfer in	Dollars	-	-	-	-\$50,000.00	-
Falview Equity Partners Emerging Companies Fund <small>ANT0002AU</small>	SMA transfer in	Units	12,227.9597	\$ 1.95	-	-\$23,800.50	-

Estimated brokerage: **\$0.00**

Order status: Submitted
 Requested by: M & S O'Shea Super Fund

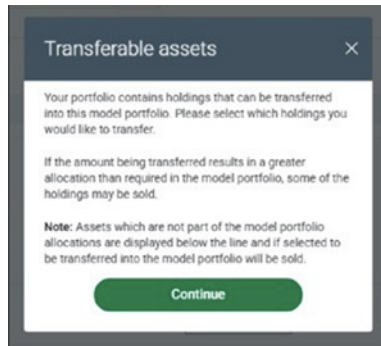
Buys/Sells (cont.)

Transfer an existing SMA

PLEASE NOTE: You can only transfer the entire holding of the SMA portfolio. Partial transfers are not available.

13 Select **Buy**, associated with the destination portfolio.

14 An information box will appear that investments can be transferred to the destination portfolio. Select **Continue**.



Summary	Account details	Investments	Transactions	Fees	Pension	Beneficiaries	Move money	Reports
Portfolio	Consolidated	Investment performance (%) ⓘ	Current value ⓘ	Units	Unit price (\$)	Price date	Current % of portfolio	
Cash Account								
Amount available to invest \$9,791.86		3.31%	\$14,397.37				3.3	
Separately Managed Accounts								
✓	SMA Antares Elite Opportunities NUN0054AU		\$49,947.73				10.8	Buy Sell ⋮
⌚ Pending transactions total \$18,199.16								
✓	SMA Antares Ex-20 NUN0102AU		\$13,885.08				3.0	Buy Sell ⋮
✓	SMA DNR Capital Australian Equities Income Portfolio ISMADNR01	5.53%	\$26,965.16				5.9	Buy Sell ⋮
⌚ Pending income entitlement. Estimated payment date 28/08/2025.								
Add a new SMA investment								
⊕ Start typing a name or code... ▼								

← **13**

Buys/Sells (cont.)

15 Select the **All** tickbox on the SMA portfolio(s) you would like to transfer.

You will also have the option to transfer platform cash, in addition to a full or partial transfer of managed or listed investments.

Select **Add**

NOTE: Transfers can still proceed when there are pending transactions. A balance will remain in the SMA portfolio to cover the pending transactions until they are settled.

Separately Managed Accounts

▼ SMA Antares Elite Opportunities
NUN0054AU

\$49,947.73

10.8

Buy Sell ⋮

🔍 Pending transactions total \$18,199.16

▼ SMA Antares Ex-20
NUN0102AU

\$13,885.08

3.0

Buy Sell ⋮

▼ SMA DNR Capital Australian Equities
Income Portfolio
ISMADNR01

5.53% **\$26,965.16**

5.9

Buy Sell ⋮

🔍 Pending income entitlement. Estimated payment date 28/08/2025.

Holdings available to transfer	Value of units No. of units	Transfer into model	<input type="checkbox"/> Select All	Estimated value to be transferred
Cash Amount available to investss	\$9,791.86	\$ 2,000.00	<input type="checkbox"/> All	\$2,000.00
SMA Antares Elite Opportunities NUN0054AU	\$49,947.73	\$ 49,947.73	<input checked="" type="checkbox"/> All	\$49,947.73
SMA Antares Ex-20 NUN0102AU	\$13,885.08	\$ 13,885.08	<input checked="" type="checkbox"/> All	\$13,885.08
The below assets are not part of the model portfolio's allocation and will be sold if selected				
NAB Capital Notes 5 NABPH	\$17,700.21 171 @ \$103.5100 per unit	\$	<input type="checkbox"/> All	\$0.00 0 units
Vanguard Aust Fixed Interest Index ETF VAF	\$32,539.54 706 @ \$46.0900 per unit	\$	<input type="checkbox"/> All	\$0.00 0 units
Vanguard Australian Shares Index ETF VAS	\$41,536.73 457 @ \$90.8900 per unit	\$	<input type="checkbox"/> All	\$0.00 0 units
Westpac Capital Notes 9 WBCPL	\$17,592.90 169 @ \$104.1000 per unit	\$	<input type="checkbox"/> All	\$0.00 0 units
Total amount				\$65,832.81 Cancel Add

▼ SMA Sandstone Income
JPL0003AU

\$40,000.00

8.7

Buy Sell ⋮



Buys/Sells (cont.)

- 16 Select **Review Order**. Once reviewed select **Submit order**.

Separately Managed Accounts

SMA Antares Elite Opportunities NUN0054AU	\$49,947.73	10.8	⊖ ⊕ ⋮
Pending transactions total \$18,199.16			
Draft transfer into model \$49,947.73			
SMA Antares Ex-20 NUN0102AU	\$13,885.08	3.0	⊖ ⊕ ⋮
Draft transfer into model \$13,885.08			
SMA DNR Capital Australian Equities Income Portfolio ISMADR01	5.53%	\$26,965.16	5.9 Buy Sell ⋮
Pending income entitlement. Estimated payment date 28/08/2025.			
Draft transfer \$65,832.81 Edit Delete			

Add a new SMA investment

⊕ Start typing a name or code... ▾

Your draft order

Buys (1)	Sells	Transfers (2)	Cash impact	Delete draft Save draft Review order
-\$2,000.00	\$0.00	\$63,832.81	-\$2,000.00	

16

Review and confirm Download order instructions pdf

Net cash movement	Total brokerage
-\$2,000.00	\$0.00

Holding	Units	Unit price (\$)	Impact (\$)
Separately managed accounts			
SMA DNR Capital Australian Equities Income Portfolio ISMADR01			▲ 65,832.81
Transfers have been scheduled for the following investments			
Cash Account	-	-	2,000.00
SMA Antares Elite Opportunities NUN0054AU	-	-	49,947.73
SMA Antares Ex-20 NUN0102AU	-	-	13,885.08

Please enter your password to proceed

Save draft Show Submit order

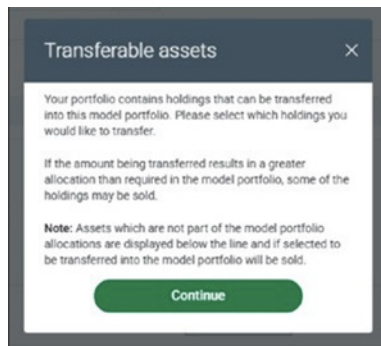
16

Buys/Sells (cont.)

Transfer an existing SMA to a new SMA portfolio

PLEASE NOTE: You can only transfer the entire holding of the SMA portfolio. Partial transfers are not available.

- 17 Under Add a new SMA investment, search and select the new SMA portfolio you would like to transfer
- 18 An information box will appear that investments can be transferred to the destination portfolio. Select **Continue**.



Buys/Sells (cont.)

19 Select the **All** tickbox on the SMA portfolio(s) you would like to transfer.

You will also have the option to transfer platform cash, in addition to a full or partial transfer of managed or listed investments.

Select **Add**

NOTE: Transfers can still proceed with pending income entitlements. Once income is distributed and applied it will be processed to the source SMA portfolio then moved to **Platform cash**.

20 Select **Review Order**. Once reviewed select **Submit order**.

Separately Managed Accounts

▼ SMA MLC Value Growth 85 (NUN5432AU) 1.58% \$50,163.51 12.0 Buy Sell

Multiple pending income entitlements. Estimated last payment date 22/10/2025.

Selected investment: SMA Antares Dividend Builder (NUN0052AU)

Holdings available to transfer	Value of units No. of units	Transfer into model	Estimated value to be transferred
Cash Amount available to invest	\$26,096.61	\$ <input type="checkbox"/> All	\$0.00
SMA MLC Value Growth 85 NUN5432AU	\$50,163.51	\$ 50,163.51 <input checked="" type="checkbox"/> All	\$50,163.51
Total amount			\$50,163.51 Cancel Add

Separately Managed Accounts

▼ SMA MLC Value Growth 85 (NUN5432AU) 1.58% \$50,163.51 12.0 ? ?

Multiple pending income entitlements. Estimated last payment date 22/10/2025.

Draft transfer into model \$50,163.51

SMA Antares Dividend Builder (NUN0052AU) Draft transfer \$50,163.51 [Edit](#) [Delete](#)

Add a new SMA investment

Your draft order

Buy	Sell	Transfers (1)	Cash impact
\$0.00	\$0.00	\$50,163.51	\$0.00

[Delete draft](#) [Save draft](#) **Review order**

Review and confirm [Download order instruction pdf](#)

Net cash movement [?](#) \$0.00

Total brokerage \$0.00

Holding	Units	Unit price (\$)	Impact (\$)
- Separately managed accounts			
▲ SMA Antares Dividend Builder (NUN0052AU)			▲ 50,163.51
ⓘ Transfers have been scheduled for the following investments			
SMA MLC Value Growth 85 (NUN5432AU)	-	-	50,163.51

19

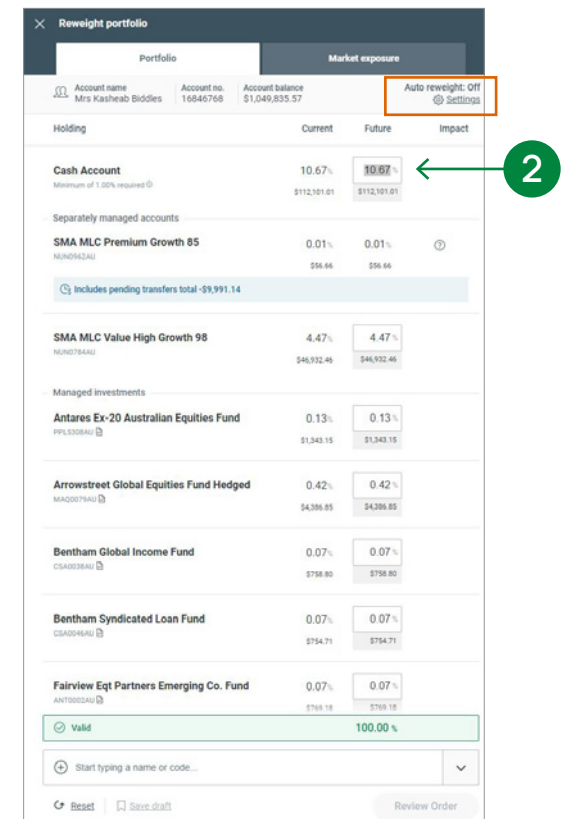
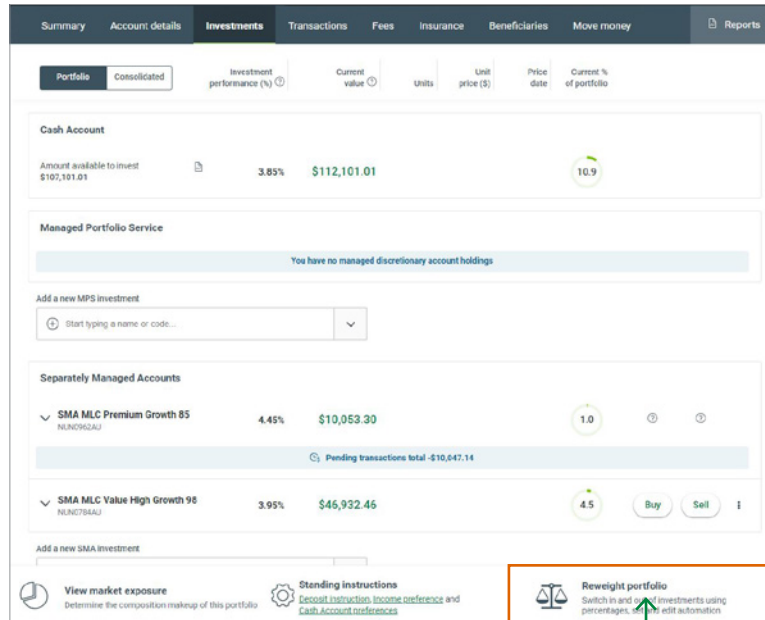
20

Reweight

Reweights can be applied to managed funds, SMAs and listed securities. **NOTE:** If the account holds investments in a Managed Discretionary Account (MDA), the reweight feature is not available.

- 1 Within the **Investments** tab, navigate to the bottom of the page and select **Reweight Portfolio**. The Reweight portfolio panel will appear.
- 2 In the **Future** column, enter the weightings for the reweight of the portfolio. New investments can be added by searching the investment fund name, APIR code, ASX code or Listed Security Asset name in the search at the bottom of the reweight panel.

An automatic reweight, can also be set up for the account. To set up these preferences, select the link at the top of the Reweight portfolio panel.



Setting up new automatic reweights and SMAs

Setting up new automatic reweights and SMAs Automatic reweights will only apply if the SMA has met the initial investment amount.

Reweight (cont.)

- 3** The Automatic Reweight frequency can be set to run quarterly, half-yearly and yearly, on the 20th of your chosen month at a 0% tolerance level, based on your Future allocation selection. Once the options and commencement date are set, select the **Save** button.

Note: Investments that do not offer daily redemptions cannot be included in an automatic reweight.

- 4** When all the reweight information is entered, select the **Next** button on the reweight panel.

- 5** Prior to submitting a reweight, you can also elect to perform a reweight now as well as scheduling future reweights.

Portfolio Market exposure

Account name: Mr Ricky Fayer | Account no.: 16655819 | Account balance: \$94,727.67 | Auto reweight: Quarterly

Automatic reweight has been set up and will only be processed after order submission

Holding	Current	Future	Impact
Transurban Group TCL	1.31% \$1,239.00	1.31% \$1,239.00	
Vanguard Aust Prop Securities Index ETF VAP	3.10% \$2,940.80	3.10% \$2,940.80	
Vanguard US Total Market Share Index ETF VTS	6.23% \$5,899.00	6.23% \$5,899.00	
Westpac Banking Corporation WBC	3.14% \$2,970.00	3.14% \$2,970.00	
Woolworths Group Limited WOW	4.61% \$4,370.00	4.61% \$4,370.00	
ADBRI Limited ABC		0.00% \$0.00	

Valid 100.00 %

Start typing a name or code...

Reset Save draft

Review Order

Half-Yearly

Quarterly

Half-Yearly

Yearly

Automatic reweight settings

Reweight frequency

Select one

Commencement date (will start on 20th of the chosen month)

MM YYYY

Submit instructions

You can elect to place the order now and enable the automatic reweight as per the frequency settings or submit the order to be executed on the defined 'Commencement date' only.

Reweight now and update future automatic reweight instruction

Update future automatic reweight instruction only

Go back Continue

TIP: Once you submit your order, you can download a PDF reweight confirmation (see 11 – next page). **Please download this PDF as there is no opportunity to download it again if you close this window.**

Reweight (cont.)

- 6 The reweight instructions can be downloaded by selecting the link at the top of the Review and confirm panel. A PDF copy will generate.

IMPORTANT: Please download this PDF as there is no opportunity to download it again if you close this window.

- 7 The reweight and/or auto reweight instructions will be submitted once your password is entered and the **Submit Order** button selected.

HINT:
You have the option at this stage to save the Draft Re-weight rather than submit and return at a later date.
To help assist you and your clients with investment information, support and tools, you can refer to the [Investment Central](#) website.

Review and confirm

Download reweight instruction pdf

Net cash movement [?] \$748.28

Total brokerage \$0.00

Tax optimisation: First in first out [?]

Investment orders Target allocation

Holding	Units	Unit price (\$)	Impact (\$)
Managed investments			
Fidelity Australian Opportunities Fund FID0021AU	-	19.805200 ▼	-1,266.76
Magellan Global Fund - Open Class Units (Managed Fund) MGE001AU	-	2.446000 ▲	518.48

Review investment orders above before you submit this order.

Please enter your password to proceed

Save draft Enter your password Show Submit order

EXPAND Essential

Reweight Instruction

Account Balance: \$234,947.77

Market exposure

Current

Future

Asset class	Current Portfolio %	Amount \$	Future Portfolio %	Amount \$
Australian Equity	0.00	0.00	56.81	140,515.87
International Equity	0.00	0.00	0.00	0.00
Global Property	0.00	0.00	0.00	0.00
Listed Property	0.00	0.00	0.00	0.00
Australian Fixed Interest	0.00	0.00	0.00	0.00
International Fixed Interest	0.00	0.00	0.00	0.00
Cash	100.00	234,947.77	40.19	94,431.90
Other	0.00	0.00	0.00	0.00
Total	100%	\$234,947.77	100%	\$234,947.77

Contact us

Postal address

Expand
GPO Box 264
Melbourne VIC 3001

Telephone

1800 517 124

Email

clientfirst@myexpand.com.au
advisoryrelationships@insigniafinancial.com.au

Website

myexpand.com.au

Service Operator

Navigator Australia Limited
ABN 45 006 302 987
AFSL 236466

Registered address

Level 1, 800 Bourke Street
Docklands VIC 3008

EXPAND

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