Morgan Stanley

Wealth Management Research

World-class research is one of the foundations of Morgan Stanley's offering to its clients. Globally, Morgan Stanley research is built on the insight and expertise of more than 600 analysts, strategists and economists.

Locally, our Wealth Management Research team takes the broad insights delivered by our global team and adapts them to Australian market conditions for the benefit of local investors.

The Morgan Stanley Wealth Management Research team was the winner in the Licensee Managed Account category and a finalist in the Multi Asset Class category and the Innovation category in the 2020 IMAP Managed Account Awards.

Licensee Managed Account Winner
2020 IMAP MANAGED ACCOUNT AWARDS

Multi Asset Class Finalist
2020 IMAP MANAGED ACCOUNT AWARDS

Innovation Finalist
2020 IMAP MANAGED ACCOUNT AWARDS

Your local research team

Nathan Lim, CFA

HEAD OF WEALTH MANAGEMENT RESEARCH

Nathan Lim is the Head of Wealth Management Research for Morgan Stanley Australia. Nathan joined Morgan Stanley from Australian Ethical Investment where he managed the award-winning Australian Ethical International Shares Fund. He started his career in 1995 and has extensive experience in asset management, research and stockbroking that has taken him across Asia, North America, the Middle East and Australia.

Nathan is a frequent speaker and writer on the intersection between finance and the environment, has a Bachelor of Commerce from the University of British Columbia, is an Honorary Adjunct Professor with the University of Technology Sydney Business School and is a CFA® charterholder.

Your local research team

Alexandre Ventelon

ASSET ALLOCATION STRATEGIST

Alexandre is responsible for producing asset allocation and strategy research, managing Wealth Management's asset allocation model portfolios and providing investment implementation advice to Morgan Stanley's financial advisers and their clients.

Alexandre has more than 13 years of investment management experience, in both wealth and institutional money management. Prior to joining Morgan Stanley, Alexandre spent four years with AustralianSuper as an Investment Strategist, where he was in charge of the build-up and management of various strategic and tactical asset allocation models, and providing cross asset research. Before joining AustralianSuper, Alexandre managed a range of multi-asset portfolios for Credit Suisse in Europe, Asia and Australia for six years.

Alexandre holds a Master in Management from Toulouse Business School and a Master in Portfolio Management from the University of Paris XII. He also holds an RG 146 superannuation accreditation and is fluent in French and English.

Wayne Chatterjee, CFA

INVESTMENT ANALYST

At Morgan Stanley, Wayne reviews listed and unlisted fund managers to help our network of advisers provide clients the best execution in implementation of key investment thematics and portfolio construction ideas, sourced from our global economic and asset allocation research team.

Wayne joined Morgan Stanley from the Royal Bank of Canada where he was responsible for equity research coverage of the Australian Oil and Gas sector. He previously held managerial and technical roles as a Mechanical Engineer, designing equipment for the mining and power industries including developing and patenting several technologies. Wayne has a Bachelor of Engineering from the University of Queensland, a Masters of Applied Finance from Macquarie University and is a CFA® charterholder.

Sharmeel Suka

INVESTMENT ANALYST

Sharmeel joined Morgan Stanley from Lonsec where he was responsible for analysing and researching managed investment products within a variety of sectors, including fixed income (global and domestic), multi-asset and global listed infrastructure.

At Morgan Stanley, Sharmeel supports the team's research publications and analyses Exchange Traded Products. Sharmeel assists with the management of multi-asset portfolios, including performing the portfolios' risk and return analysis.

Sharmeel has a Bachelor of Commerce from the University of Melbourne, a Masters of Applied Finance from Monash University and is currently undergoing the CFA® program.

Sophie Egan

INVESTMENT ANALYST

Sophie completed the Morgan Stanley Wealth Management Summer Analyst Program in February 2019 and started the Graduate Program within the research team in February 2020.

Sophie supports the Wealth Management research team by helping to deliver Morgan Stanley's research to the financial adviser network and assisting the team with the Exchange Traded Products analyses.

Sophie holds a Bachelor of Commerce and Bachelor of Arts from the University of Sydney and completed university exchange programs at London School of Economics and Copenhagen Business School.