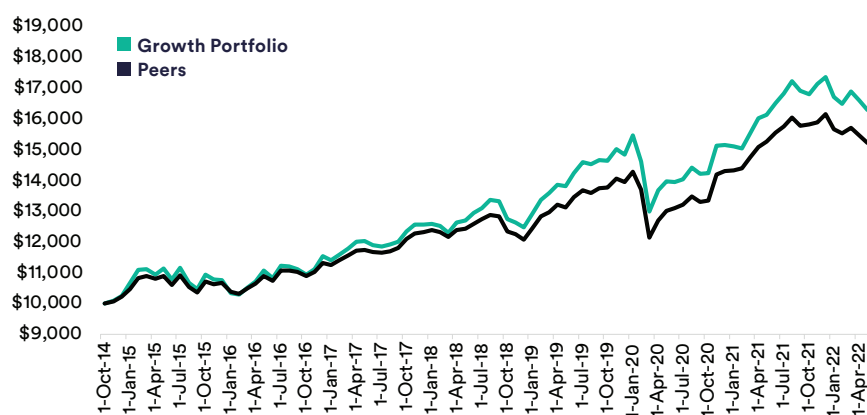


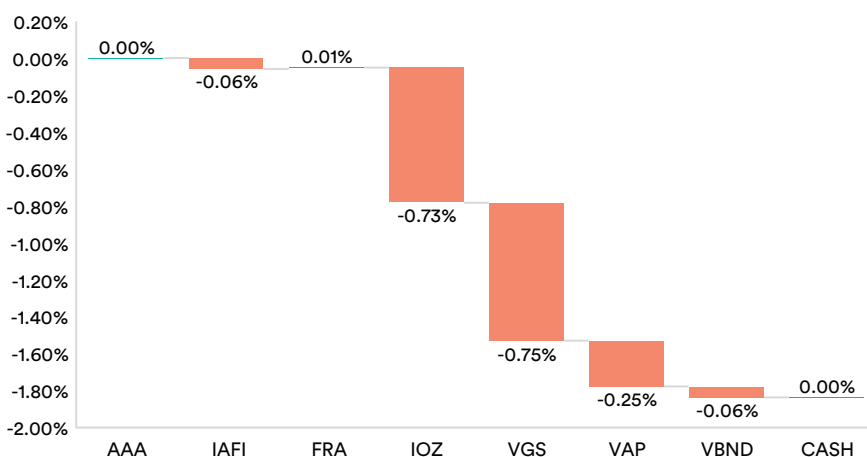
# InvestSMART Growth Portfolio

## Performance of \$10,000 since inception



As at 31 May 2022. Portfolio inception: 24 Oct 2014

## Attribution of returns



For the month of May



### Portfolio mandate

The Growth Portfolio is an exciting choice if you're saving for long term goals (5-years-plus) or you want to grow wealth for the future.

The objective is to invest in a portfolio of 5 - 15 exchange traded funds (ETFs), with more of an emphasis on 'growth' assets like shares and property that have the potential to appreciate in value over time.

### \$10,000

Minimum initial investment

### 5+ yrs

Suggested investment timeframe

### 5 - 15

Indicative number of securities

### Risk profile: High

Expected loss in 4 to 6 years out of every 20 years

### Morningstar AUS Growth Target Allocation Net Return (NR) AUD

Benchmark

## Performance vs Peers

	1 mth	1 yr	3 yrs	5 yrs	SI p.a
<b>Growth Portfolio</b>	-1.9%	1.0%	5.7%	6.2%	6.6%
<b>Peers</b>	-1.5%	-0.2%	5.0%	5.3%	5.7%
<b>Excess to Peers</b>	-0.4%	1.2%	0.7%	0.9%	0.9%

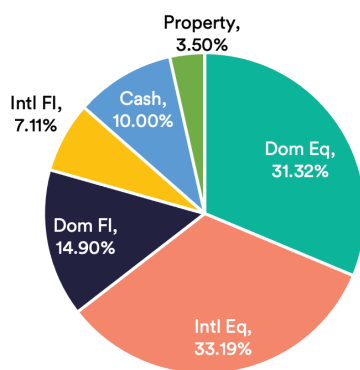
Fees: InvestSMART Growth 0.55% & Average of 820 peers 1.60%

Note: Our InvestSMART Growth is benchmarked against Morningstar® Australia Growth Target Allocation NR AUD+

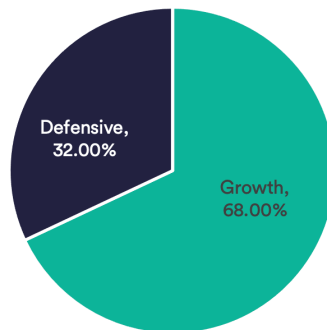
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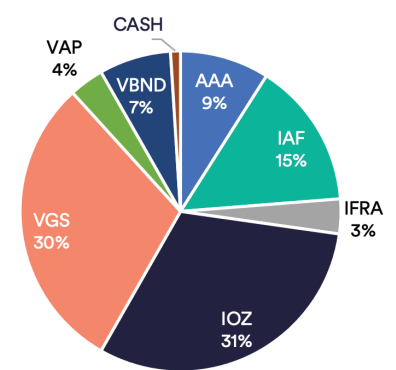
### By class



### By profile



### By holdings



## Our Investment Committee



**Alastair Davidson**  
Head of Funds Management



**Effie Zahos**  
Independent Director



**Alan Kohler**  
Editor-in-Chief



**Paul Clitheroe**  
Chairman



**Ron Hodge**  
Managing Director

### Important information

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