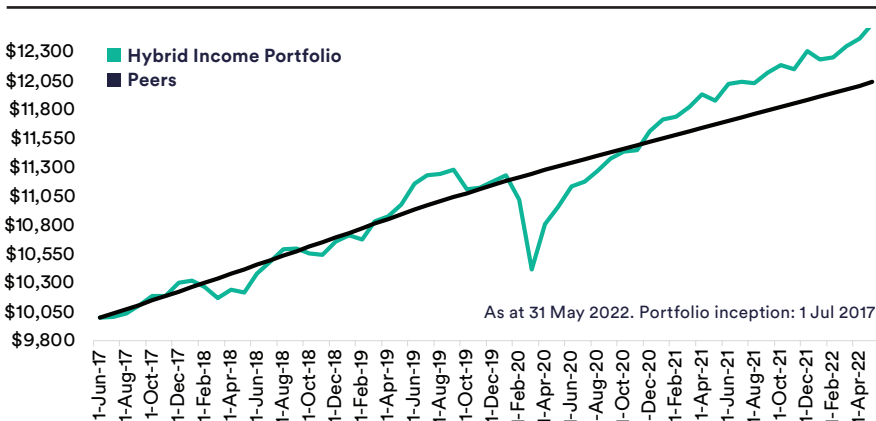
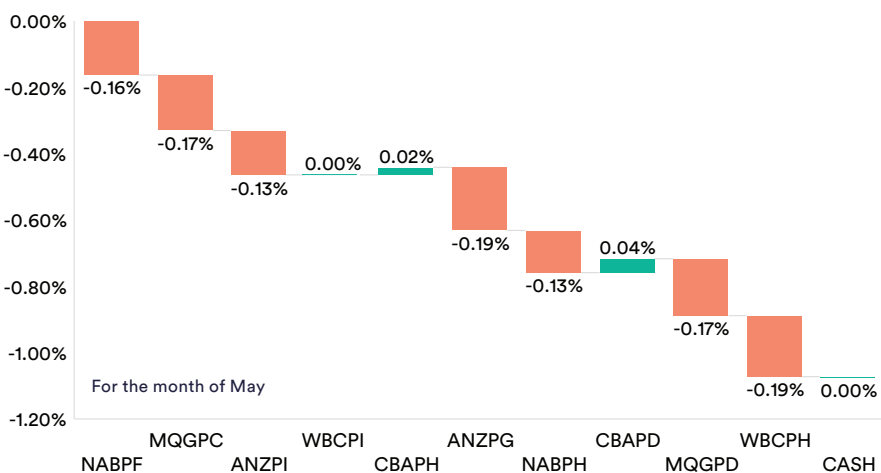


# InvestSMART Hybrid Income Portfolio

## Performance of \$10,000 since inception



## Attribution of returns



Performance					
	1 mth	1 yr	3 yrs	4 yrs	SI p.a
Hybrid Income Portfolio	1.0%	5.6%	4.5%	5.3%	4.7%
RBA Cash Rate + 3%	0.3%	3.2%	3.4%	3.7%	3.9%
Excess to Benchmark	0.7%	2.4%	1.1%	1.6%	0.8%

Note: Our InvestSMART Hybrid Income is benchmarked against RBA cash rate + 3%. Performance includes franking credits. As at 30 April 2022. Portfolio inception: 1 July 2017



## Portfolio mandate

The InvestSMART Hybrid Income Portfolio provides Australian investors an opportunity to diversify their income stream, with a portfolio of predominantly ASX-listed hybrid securities. The Portfolio is invested in a mix of 5 - 15 Australian listed hybrids, listed debt securities and cash, all managed in the one portfolio.

 **\$25,000**

Minimum initial investment

 **3+ yrs**

Suggested investment timeframe

 **5 - 15**

Indicative number of securities

 **Risk profile: Medium**

Expected loss in 2 to 3 years out of every 20 years

 **RBA Cash Rate Plus 3%**

Benchmark

## 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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