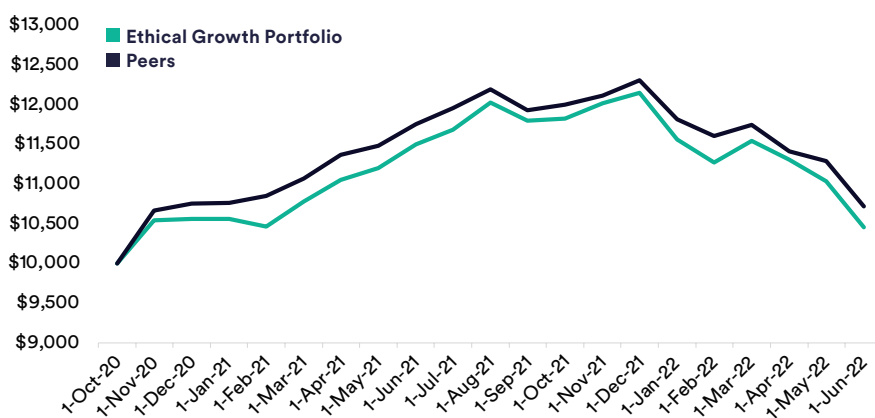


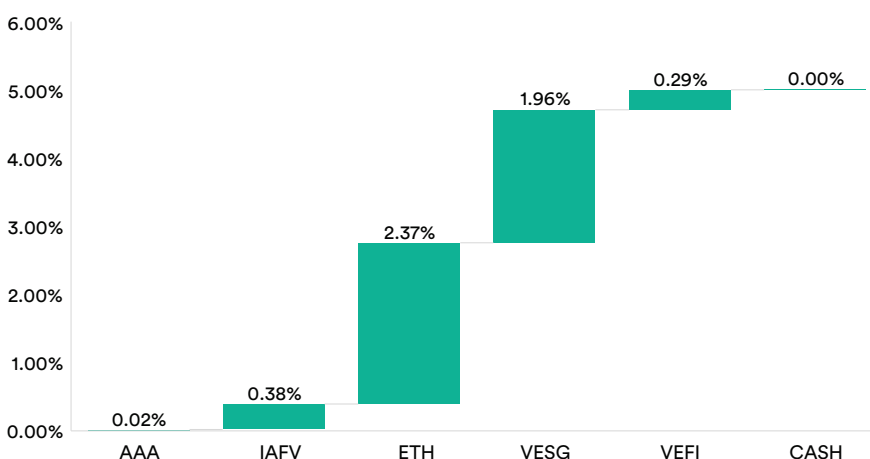
# InvestSMART Ethical Growth Portfolio

## Performance of \$10,000 since inception



As at 31 July 2022. Portfolio inception: 1 Nov 2020

## Attribution of returns




For the month of July




### Portfolio mandate


The Ethical Growth portfolio invests in sustainable, responsible, and/or ethical investments providing you an ethical portfolio that looks 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 Australian and international shares 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: Medium - 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\*

	6 mths	1 yr	SI p.a
<b>Ethical Growth Portfolio</b>	-5.0%	-6.1%	5.5%
<b>Peers</b>	-5.3%	-6.5%	6.6%
<b>Excess to Peers</b>	0.3%	0.4%	-1.1%

Fees: InvestSMART Ethical Growth 0.55% vs Average of 452 peers 1.37%

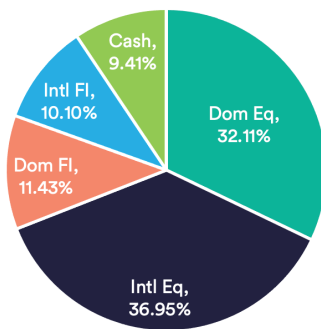
Note: Our InvestSMART Growth is benchmarked against Morningstar® Australia Growth Target Allocation NR AUD+

As at 31 July 2022. Portfolio inception: 1 November 2020

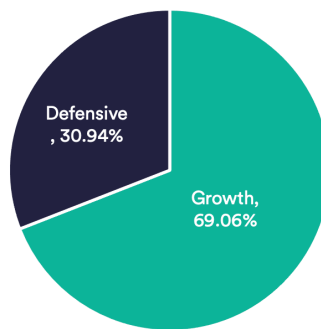
\* Performance shown is theoretical from 1 November 2020 and includes management fees but excludes brokerage and other trading costs.

## Attribution of returns

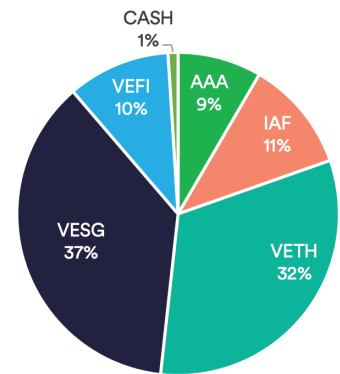
### By class



### 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

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