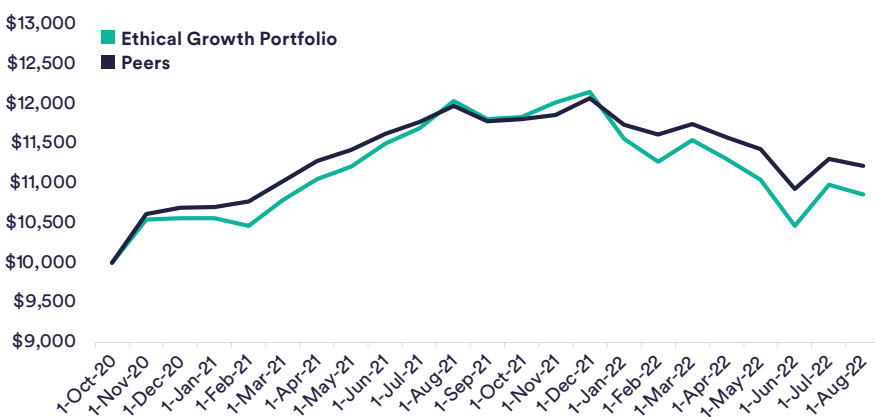


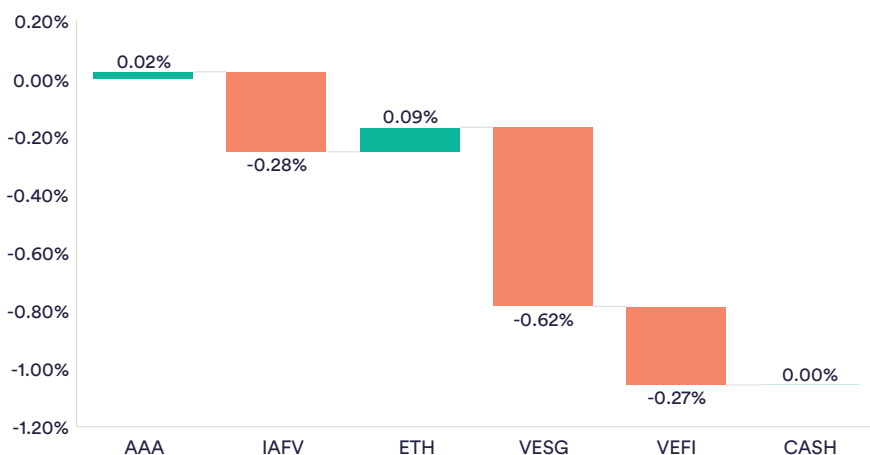
# InvestSMART Ethical Growth Portfolio

## Performance of \$10,000 since inception



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

## Attribution of returns



For the month of August



## 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>	-3.7%	-9.7%	4.6%
<b>Peers</b>	-3.4%	-6.3%	6.5%
<b>Excess to Peers</b>	-0.3%	-3.4%	-1.9%

Fees: InvestSMART Ethical Growth 0.55% vs Average of 582 peers 1.50%

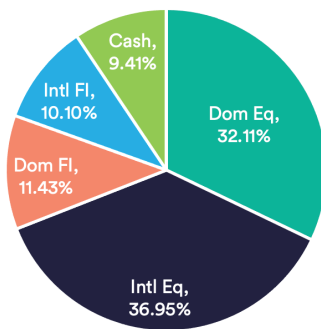
Note: Our InvestSMART Growth is benchmarked against Morningstar® Australia Growth Target Allocation NR AUD+

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

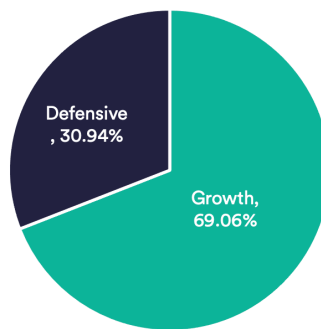
\* Performance shown is theoretical from 1 November 2020 and includes management fees but excludes brokerage and other trading costs.

## Attribution of returns

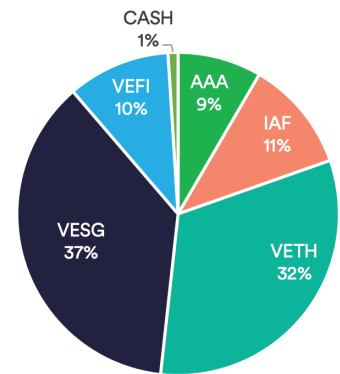
### By class



### 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

### Important information

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