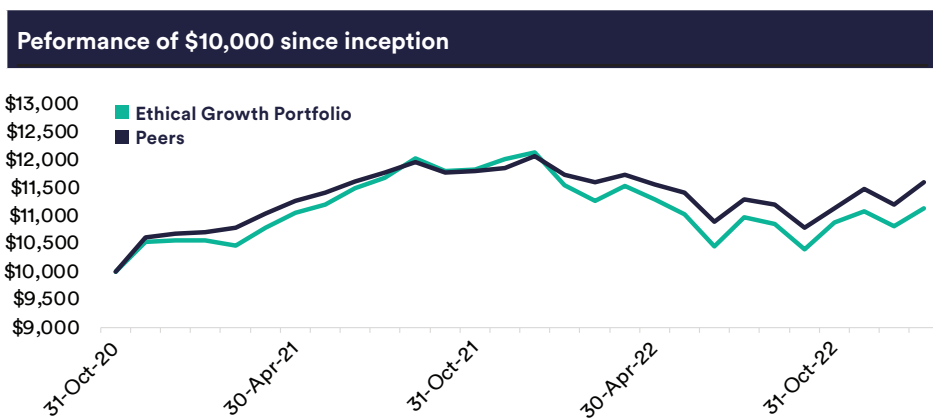


# InvestSMART Ethical Growth Portfolio

## Data as at 31 January 2023

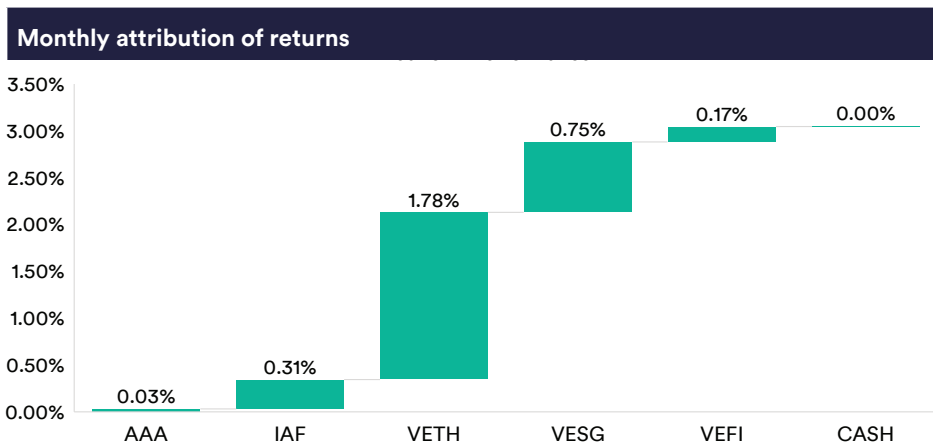
Portfolio inception: 1 November 2020



**Performance vs Peers**

	6 mths	1 yr	2 yrs p.a	SI p.a
Ethical Growth Portfolio	1.5%	-3.6%	2.7%	4.9%
Peers	2.6%	-1.2%	4.0%	6.8%
Excess to Peers	-1.1%	-2.4%	-1.3%	-1.9%

InvestSMART Ethical Growth fees are 0.55% Vs Average of 811 peers 1.44%



### 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

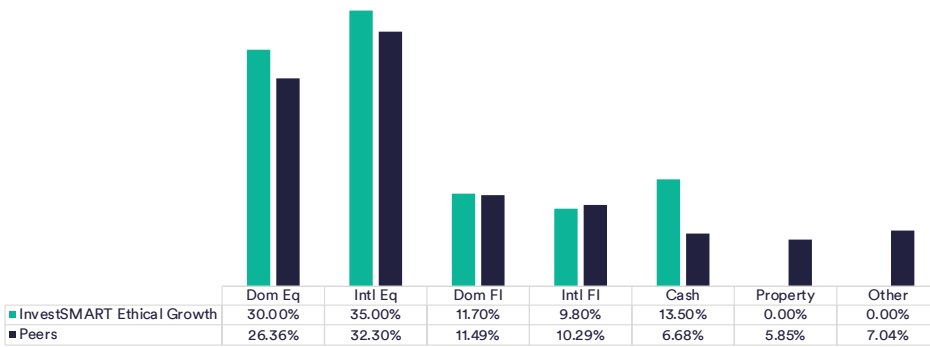
**5+ yrs**  
Suggested investment timeframe

**5 - 15**  
Indicative number of securities

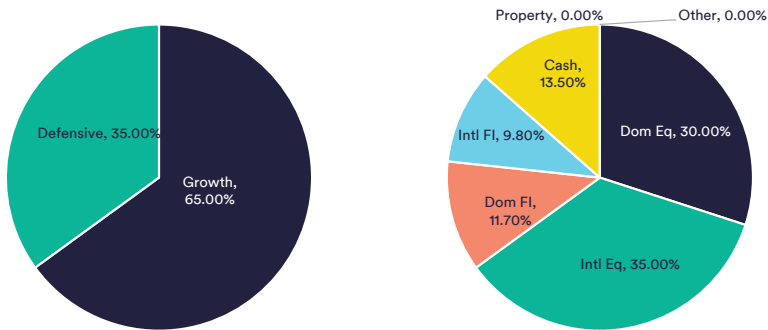
**Risk profile: Medium - High**  
Expected loss in 4 to 6 years out of every 20 years

**Morningstar AUS Growth Target Allocation Net Return (NR) AUD**  
Benchmark

## Asset allocation vs Peers



## Asset allocation



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**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

## 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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