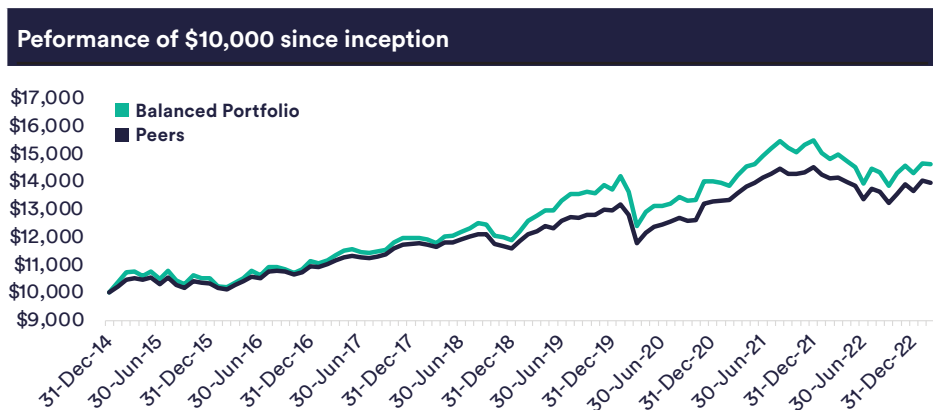


# InvestSMART Balanced Portfolio

## Data as at 28 February 2023

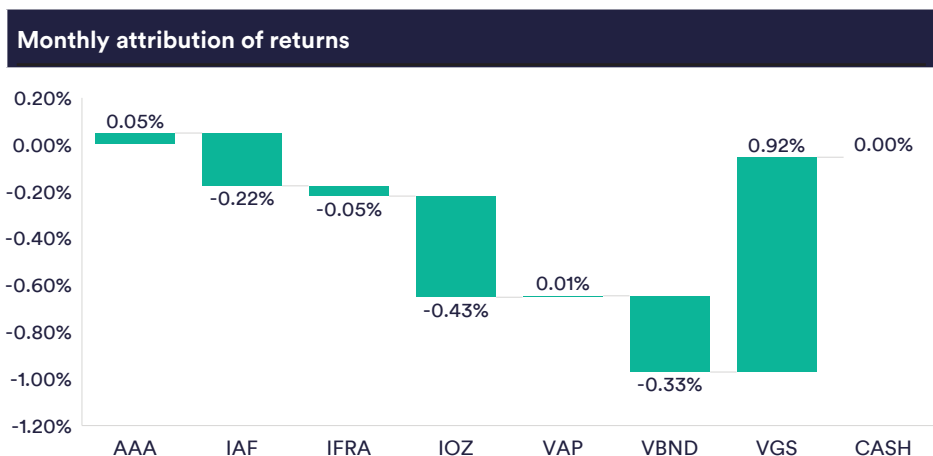
Portfolio inception: 29 December 2014



**Performance vs Peers**

	1 yr	3 yrs p.a	5 yrs p.a	7 yrs p.a	SI p.a
Balanced Portfolio	-1.2%	2.4%	4.2%	5.3%	4.7%
Peers	-1.4%	2.7%	3.4%	4.7%	4.2%
Excess to Peers	0.2%	-0.3%	0.8%	0.6%	0.5%

InvestSMART Balanced fees are 0.55% Vs Average of 198 peers 0.97%.



### Portfolio mandate

The Balanced Portfolio is a simple way to get exposure across many different markets. The potential for capital growth over 3 to 5 years lets your portfolio do more of the hard yards working towards your goals

The objective is to invest in a portfolio of 5-15 exchange traded funds (ETFs), that provide a more even mix of regular income plus the potential for capital growth through equities, property and infrastructure assets.

**\$10,000**  
Minimum initial investment

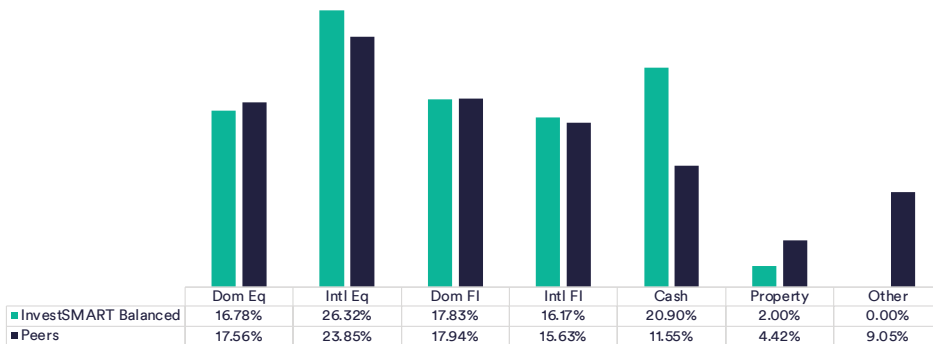
**4+ yrs**  
Suggested investment timeframe

**5 - 15**  
Indicative number of securities

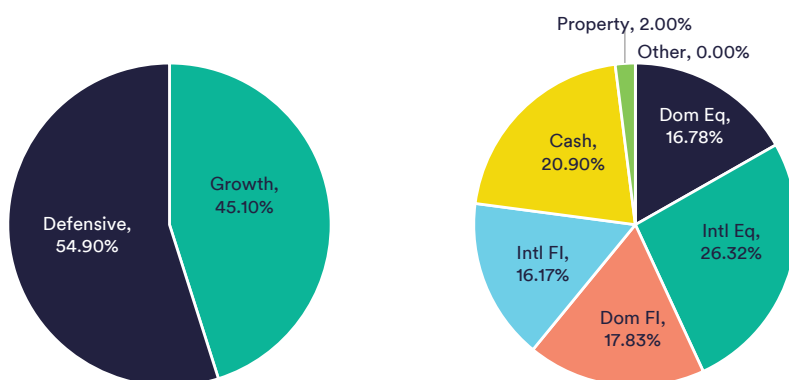
**Risk profile: Medium - High**  
Expected loss in 3 to 4 years out of every 20 years

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

## Asset allocation vs Peers



## Asset allocation breakdown



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## 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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