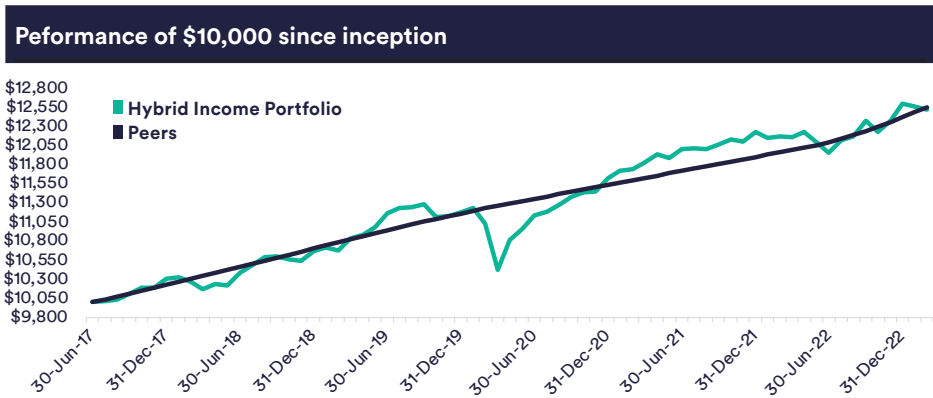


# InvestSMART Hybrid Income Portfolio

## Data as at 28 February 2023

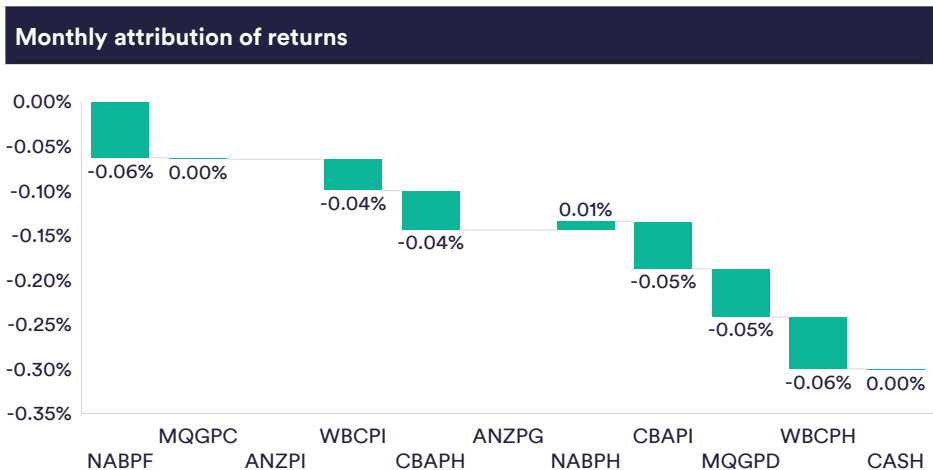
Portfolio inception: 1 July 2017



**Performance vs Peers**

	1 yr	3 yrs p.a	5 yrs p.a	SI p.a
Hybrid Income Portfolio	2.9%	4.3%	4.0%	4.0%
RBA Cash Rate + 3%	4.9%	3.8%	4.0%	4.1%
Excess to Benchmark	-2.0%	0.5%	0.0%	-0.1%

InvestSMART Hybrid Income is benchmarked against RBA cash rate + 3%. Performance includes franking credits



### 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




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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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