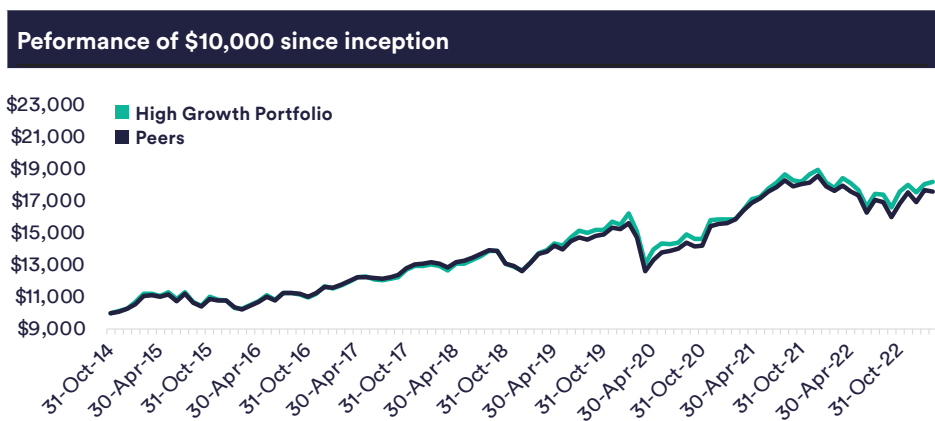


# InvestSMART High Growth Portfolio

## Data as at 28 February 2023

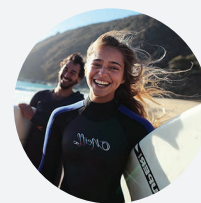
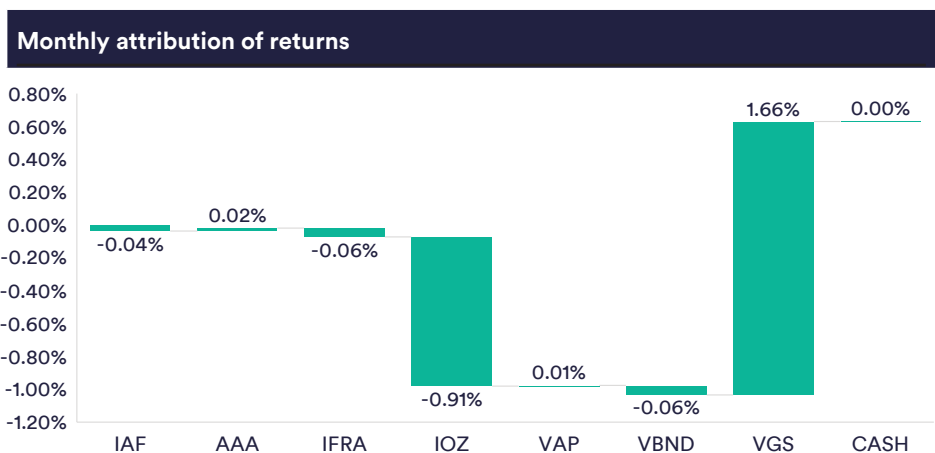
Portfolio inception: 27 October 2014



**Performance vs Peers**

|                       | 1 yr  | 3 yrs p.a | 5 yrs p.a | 7 yrs p.a | SI p.a |
|-----------------------|-------|-----------|-----------|-----------|--------|
| High Growth Portfolio | 2.0%  | 6.4%      | 7.0%      | 8.5%      | 7.4%   |
| Peers                 | -0.3% | 6.0%      | 6.0%      | 8.1%      | 7.0%   |
| Excess to Peers       | 2.3%  | 0.4%      | 1.0%      | 0.4%      | 0.4%   |

InvestSMART High Growth fees are 0.55% Vs Average of 145 peers 1.08%



### Portfolio mandate

The High Growth Portfolio is all about helping you build long term wealth and achieve goals with a timeframe of 7-years-plus to ride out the ups and down of markets.

The objective is to invest in a portfolio of 5-15 exchange traded funds (ETFs), predominantly focused on growth assets (shares and property) though nicely rounded out with exposure to a little bit of fixed income investments like bonds and cash.

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

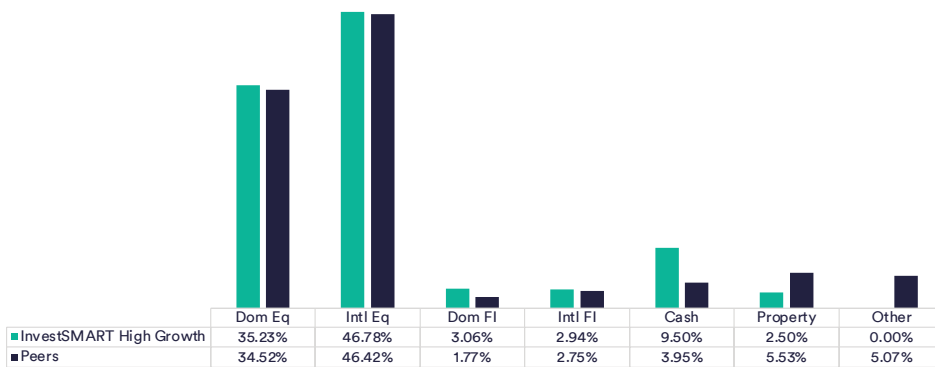
**7+ yrs**  
Suggested investment timeframe

**5 - 15**  
Indicative number of securities

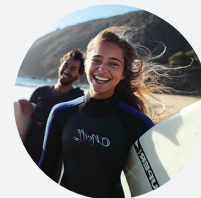
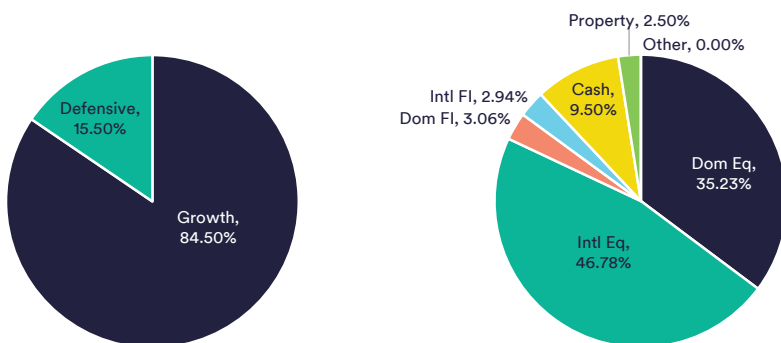
**Risk profile: High**  
Expected loss in 4 to 6 years out of every 20 years

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

## Asset allocation vs Peers



## Asset allocation



## Portfolio mandate

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**\$10,000**

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Indicative number of securities

**Risk profile: High**

Expected loss in 4 to 6 years out of every 20 years

**Morningstar AUS Aggressive 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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