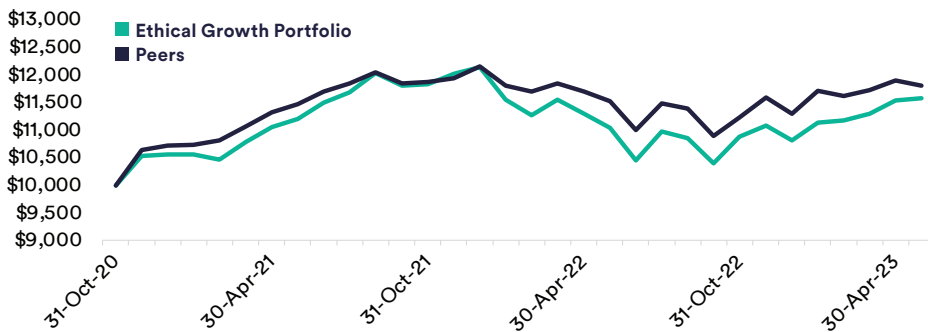


# InvestSMART Ethical Growth Portfolio

## Data as at 31 May 2023

Portfolio inception: 1 November 2020

### Performance of \$10,000 since inception



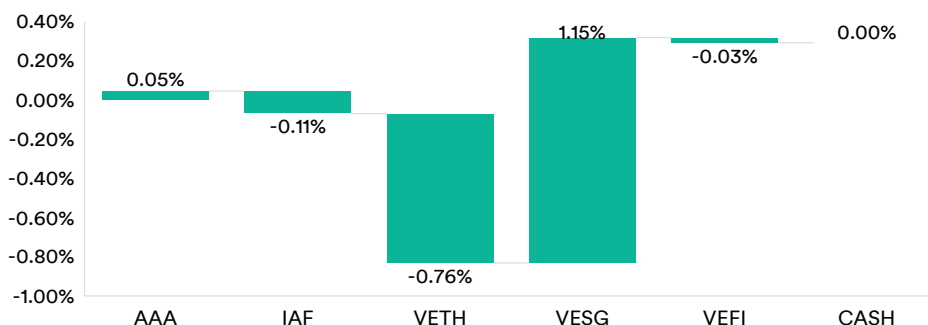
### Performance vs Peers

	6 mths	1 yr	2 yrs p.a	SI p.a
Ethical Growth Portfolio	4.4%	4.8%	1.6%	5.8%
Peers	1.9%	2.5%	1.5%	6.6%
Excess to Peers	2.5%	2.3%	0.1%	-0.8%

InvestSMART Ethical Growth Portfolio fees are 0.55% p.a. vs average of 218 peers at 1.27% p.a.

Grow your returns, not your fees with InvestSMART **Capped fees**

### Monthly attribution of returns



### 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

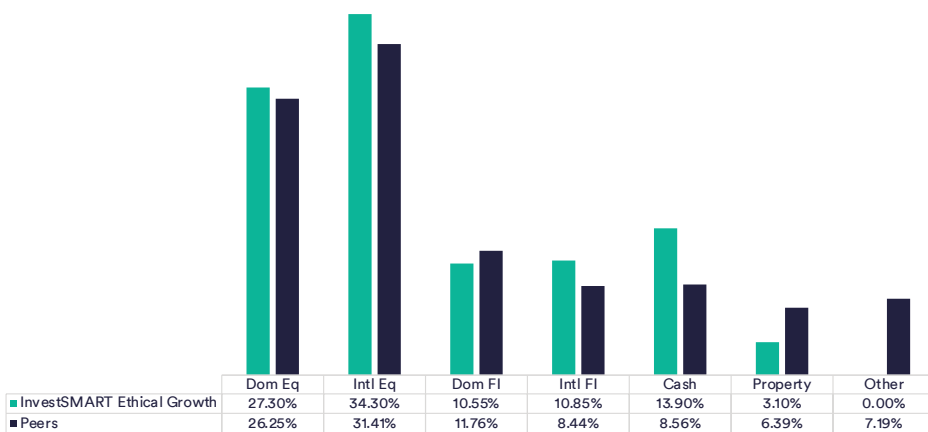
**5+ yrs**  
Suggested investment timeframe

**5 - 15**  
Indicative number of securities

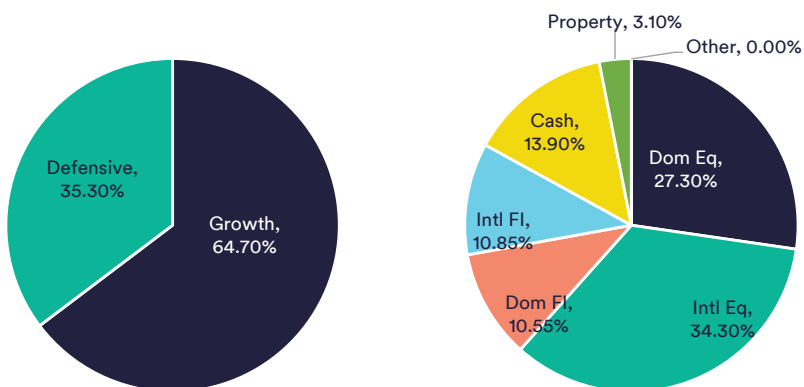
**Risk profile: Medium - High**  
Expected loss in 4 to 6 years out of every 20 years

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

## Asset allocation vs Peers



## Asset allocation



## Portfolio mandate

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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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