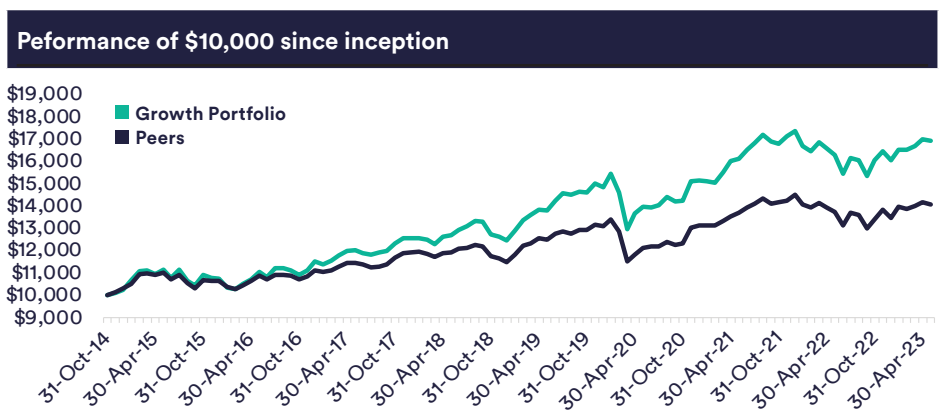


InvestSMART Growth Portfolio

Data as at 31 May 2023

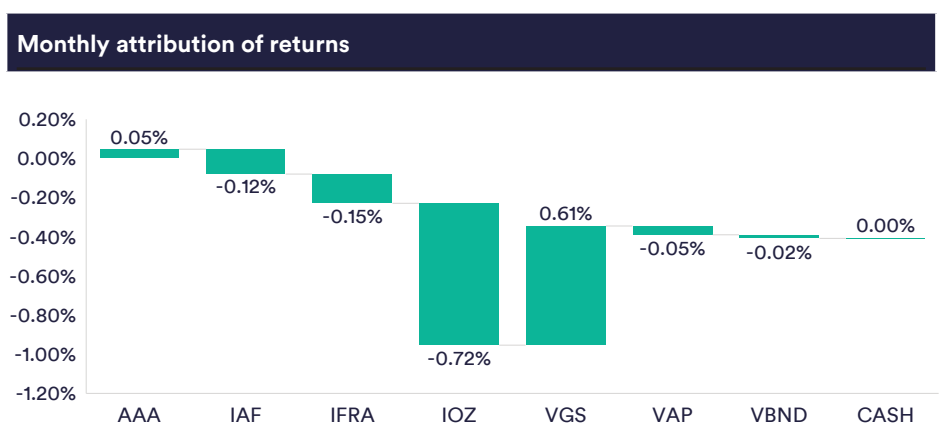
Portfolio inception: 24 October 2014



Performance vs Peers

	1 yr	3 yrs p.a	5 yrs p.a	7 yrs p.a	SI p.a
Growth Portfolio	3.9%	6.6%	5.9%	6.3%	6.3%
Peers	2.5%	5.1%	3.4%	3.8%	4.1%
Excess to Peers	1.4%	1.5%	2.5%	2.5%	2.2%

InvestSMART 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**



Portfolio mandate

The Growth Portfolio is an exciting choice if you're saving for long term goals (5-years-plus) or you want 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 shares and property that have the potential to appreciate in value over time.

\$10,000
Minimum initial investment

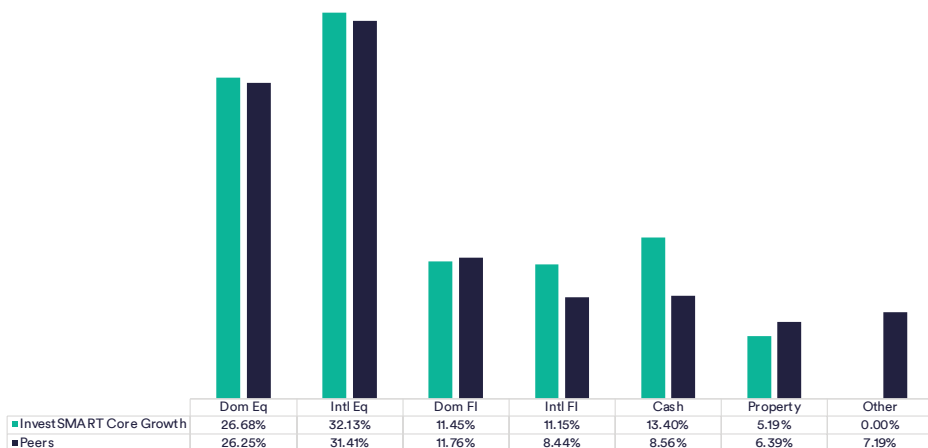
5+ yrs
Suggested investment timeframe

5 - 15
Indicative number of securities

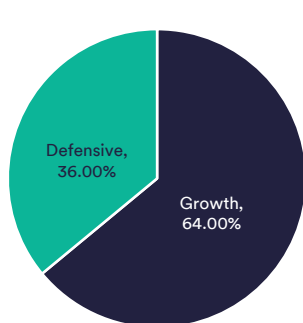
Risk profile: High
Expected loss in 4 to 6 years out of every 20 years

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

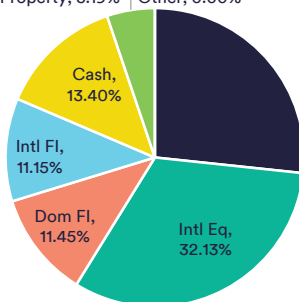
Asset allocation vs Peers



Asset allocation breakdown



Property, 5.19% - Other, 0.00%



Portfolio mandate

The Growth Portfolio is an exciting choice if you're saving for long term goals (5-years-plus) or you want to grow wealth for the future.

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\$10,000

Minimum initial investment

5+ 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 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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