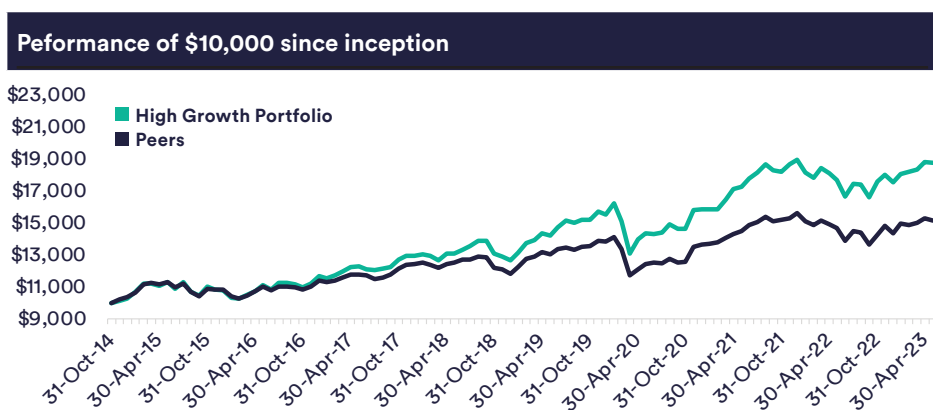


# InvestSMART High Growth Portfolio

## Data as at 31 May 2023

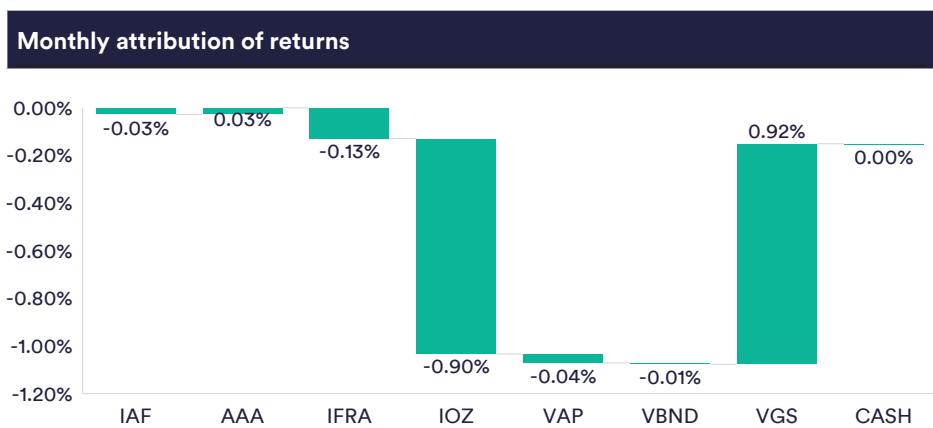
Portfolio inception: 27 October 2014



**Performance vs Peers**

	1 yr	3 yrs p.a.	5 yrs p.a.	7 yrs p.a.	SI p.a.
High Growth Portfolio	6.0%	9.3%	7.4%	7.8%	7.6%
Peers	3.1%	6.8%	3.9%	4.6%	5.0%
Excess to Peers	2.9%	2.5%	3.5%	3.2%	2.6%

InvestSMART High Growth Portfolio fees are 0.55% p.a. vs average of 175 peers at 1.06% p.a.  
Grow your returns, not your fees with InvestSMART **Capped fees**



### 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

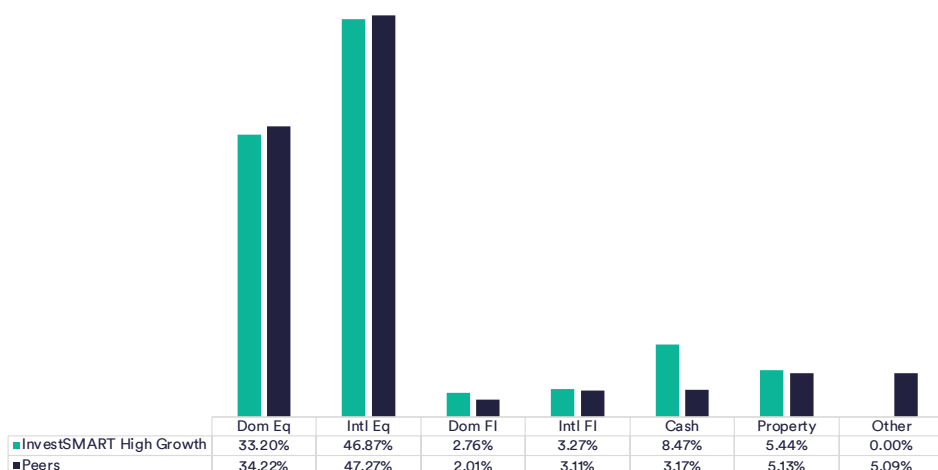
### Risk profile: High

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

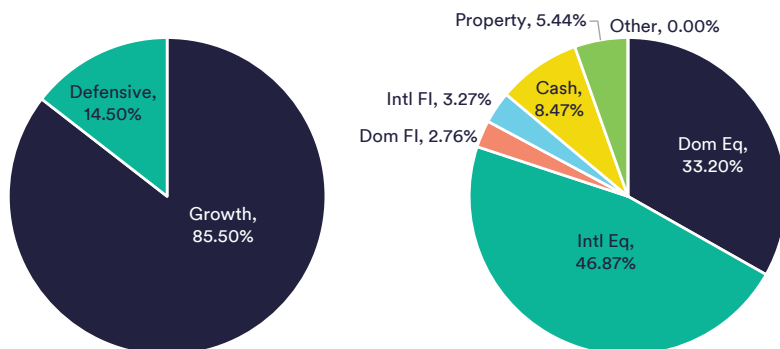
### Morningstar AUS Aggressive Target Allocation Net Return (NR) AUD

Benchmark

## Asset allocation vs Peers



## Asset allocation



## 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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Benchmark