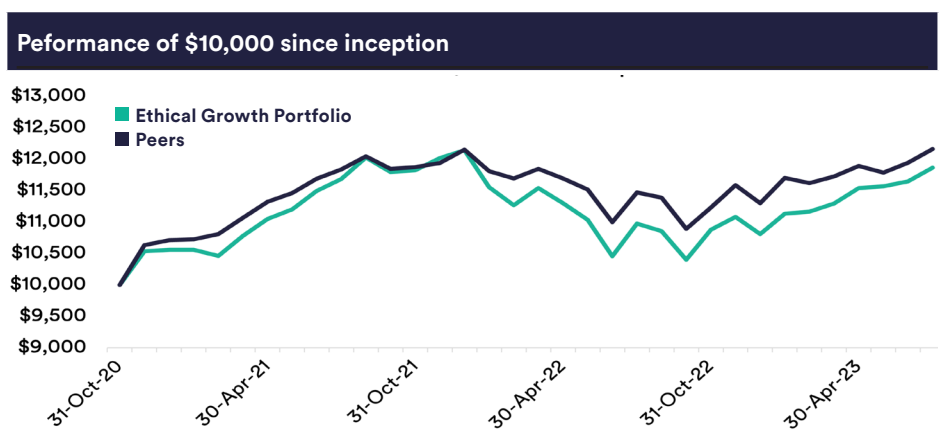


InvestSMART Ethical Growth Portfolio

Data as at 31 July 2023

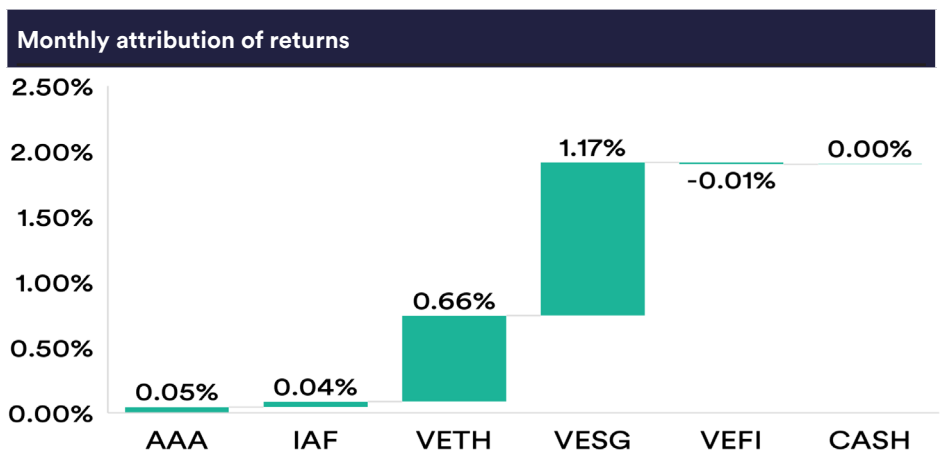
Portfolio inception: 1 November 2020



Performance vs Peers

	6 mths	1 yr	2 yrs p.a	SI p.a
Ethical Growth Portfolio	6.6%	8.1%	0.8%	6.4%
Peers	3.9%	6.0%	1.4%	7.4%
Excess to Peers	2.7%	2.1%	-0.6%	-1.0%

InvestSMART Ethical Growth Portfolio fees are 0.55% p.a. vs average of 556 peers at 1.38% p.a.
Grow your returns, not your fees with InvestSMART **Capped fees**



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

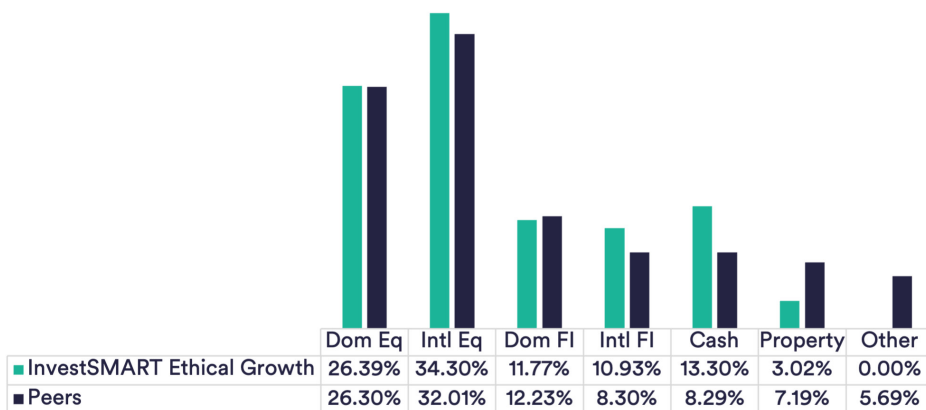
5+ yrs
Suggested investment timeframe

5 - 15
Indicative number of securities

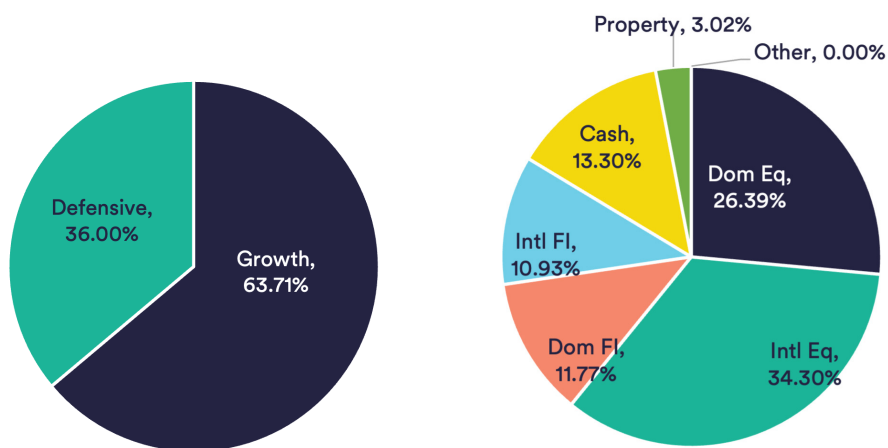
Risk profile: Medium - High
Expected loss in 4 to 6 years out of every 20 years

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

Asset allocation vs Peers



Asset allocation



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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