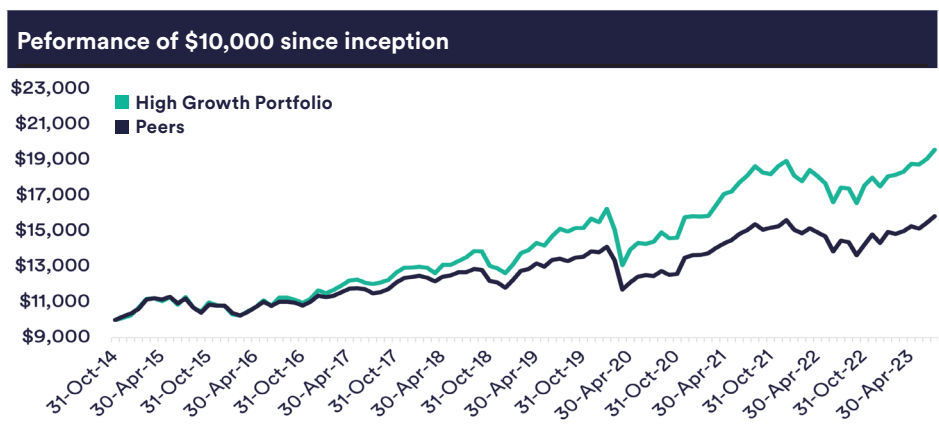


InvestSMART High Growth Portfolio

Data as at 31 July 2023

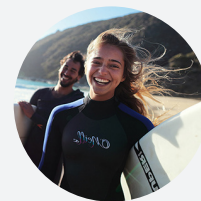
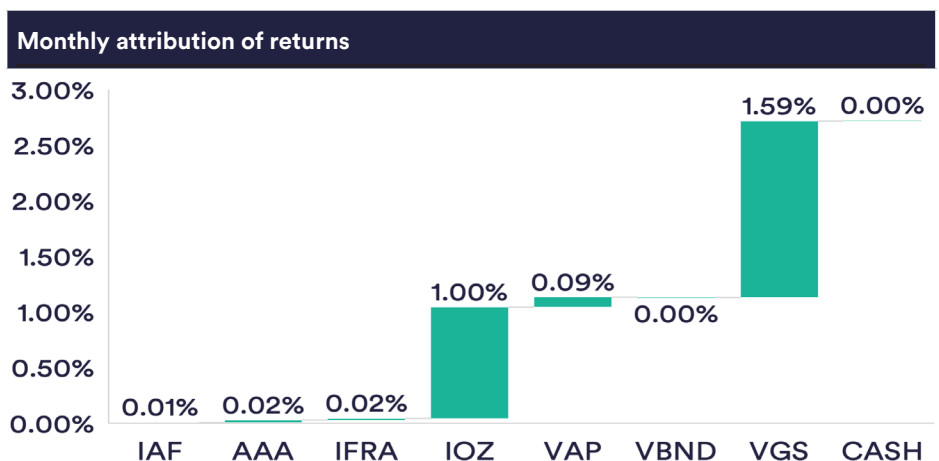
Portfolio inception: 27 October 2014



Performance vs Peers

	1 yr	3 yrs p.a	5 yrs p.a	7 yrs p.a	SI p.a
High Growth Portfolio	12.1%	10.8%	7.7%	8.2%	8.0%
Peers	9.3%	8.2%	4.5%	5.3%	5.4%
Excess to Peers	2.8%	2.6%	3.2%	2.9%	2.6%

InvestSMART High Growth Portfolio fees are 0.55% p.a. vs average of 346 peers at 1.19% 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

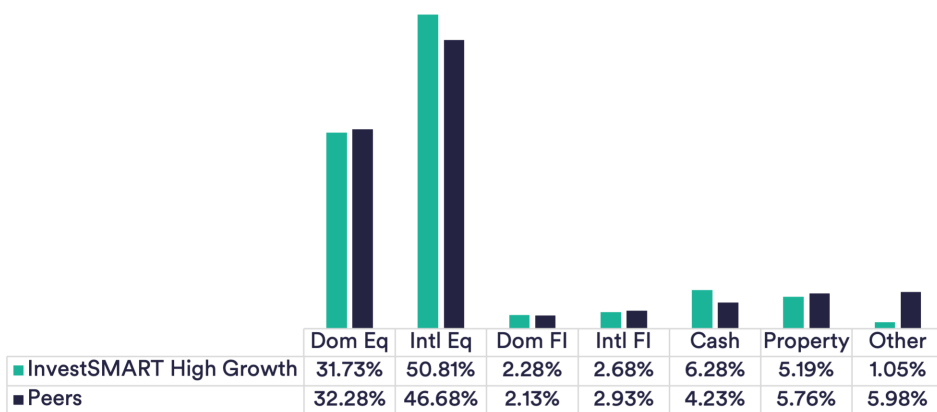
7+ yrs
Suggested investment timeframe

5 - 15
Indicative number of securities

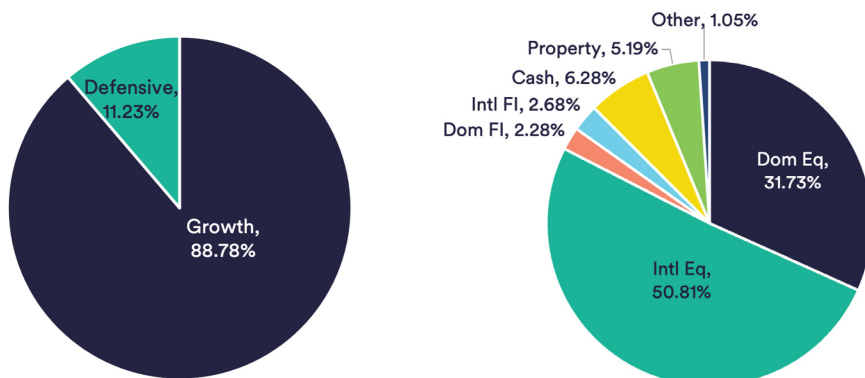
Risk profile: High
Expected loss in 4 to 6 years out of every 20 years

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



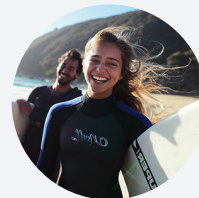
Paul Clitheroe

Chairman



Ron Hodge

Managing Director



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

Morningstar AUS Aggressive Target Allocation Net Return (NR) AUD

Benchmark

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