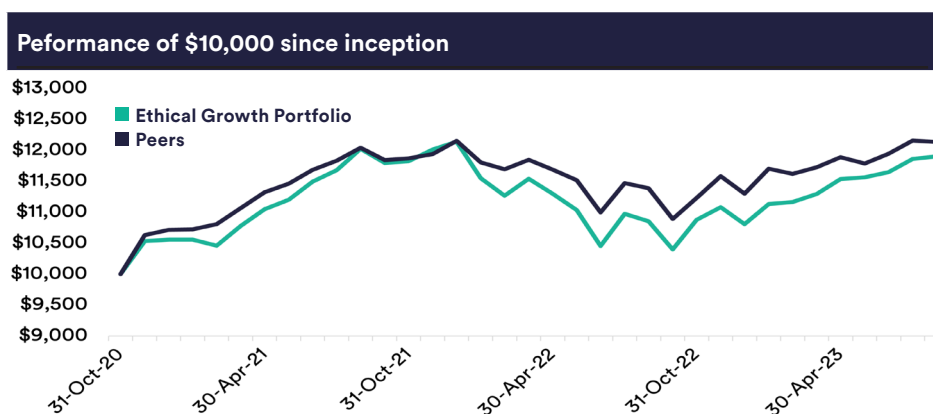


InvestSMART Ethical Growth Portfolio

Data as at 31 August 2023

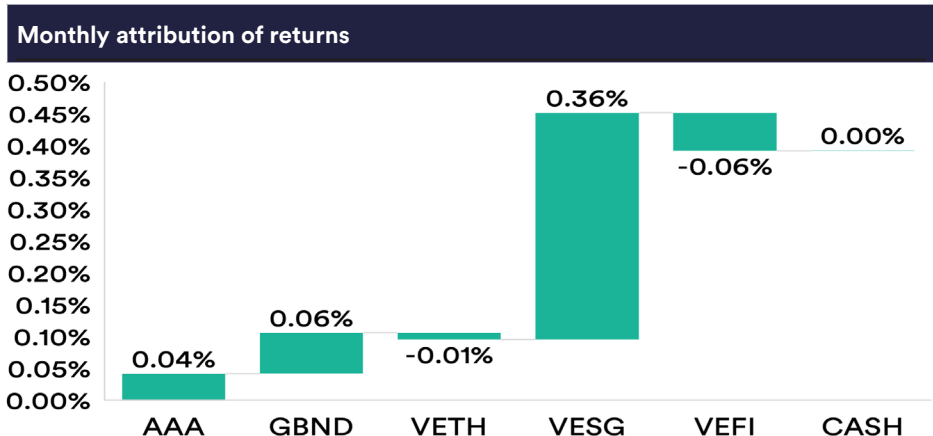
Portfolio inception: 1 November 2020



Performance vs Peers

	6 mths	1 yr	2 yrs p.a	SI p.a
Ethical Growth Portfolio	6.6%	9.7%	-0.5%	6.3%
Peers	4.4%	6.6%	0.4%	7.1%
Excess to Peers	2.2%	3.1%	-0.9%	-0.7%

InvestSMART Ethical Growth Portfolio fees are 0.55% p.a. vs average of 611 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

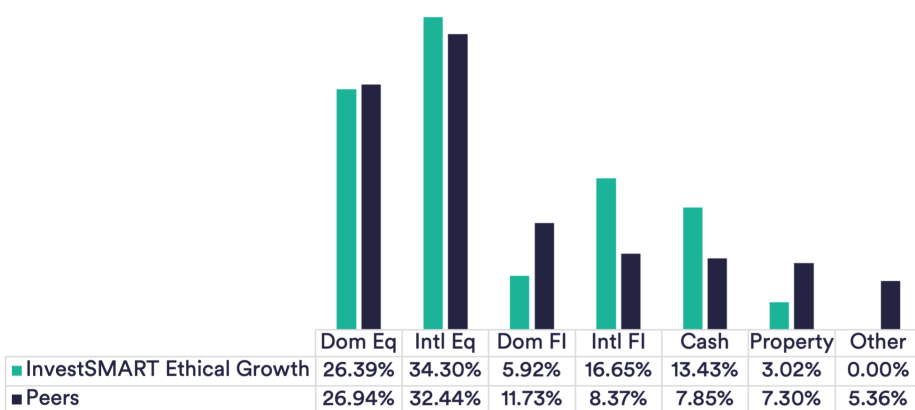
5+ yrs
Suggested investment timeframe

5 - 15
Indicative number of securities

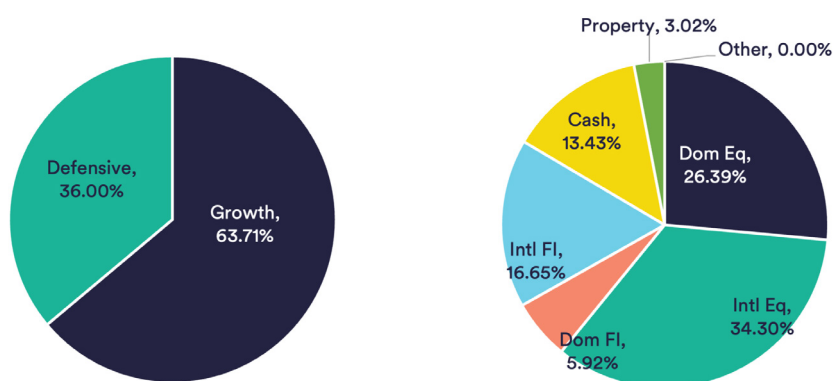
Risk profile: Medium - High
Expected loss in 4 to 6 years out of every 20 years

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

Asset allocation vs Peers



Asset allocation



Portfolio mandate

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Suggested investment timeframe

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Indicative number of securities

Risk profile: Medium - High

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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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