



# Investments update

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15 June 2026

## Trustee update – Investment list holding limits

Following a recent platform review, we've applied new holding limits on some managed funds available on the CFS Edge Super and Pension investment list. This change supports prudent portfolio construction while aligning with broader industry direction and regulatory expectations.

A holding limit is the maximum percentage of an account's total portfolio that can be held in a specific managed fund. You can find the new holding limits for the affected managed funds [here](#).

These new holding limits are separate to the existing diversification limits on CFS Edge which apply at an investment category level (e.g. Australian share – small companies at 30%) and are guidelines only. As Trustee, we suggest that no more of a member's portfolio is invested in each investment category than indicated by these guidelines. For more information on diversification limits, please refer to the [CFS Edge Other Important Information brochure](#) and the Investment list at [cfs.com.au/cfsedge](https://cfs.com.au/cfsedge).

## What does this mean for members?

This change applies for CFS Edge Super and Pension members only.

Members will be able to retain their current holdings in these investment options, including where those holdings already exceed the new holding limit. However, once the new holding limit is reached, members will not be able to make additional investments in these options.

Members should speak with their financial adviser to determine whether these investments remain appropriate for their individual circumstances and investment strategy.

If members don't have an adviser and would like to understand what this change means for their individual circumstances, we recommend they speak with an adviser. To find an adviser, you can call us or use the CFS Find an adviser service at [CFS Find an adviser](#).

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