Introducing CFS Index 150

Geared capability in a modern managed account structure

The CFS Index 150 SMA is a diversified portfolio constructed using index-based building blocks combined with selected geared exposures and active portfolio management. It's both simple in structure and deliberate in design.

Built on scale and experience

CFS has been managing geared strategies since 1997 through multiple market cycles and periods of market volatility. Today, CFS is Australia's largest provider of geared strategies, with more than $13.6 billion in funds under management[1].

That experience now sits within a modern managed account framework.

How it works

Gearing amplifies exposure by combining client capital with borrowings at the fund level.

Every $100,000 invested in the Index 150 SMA, delivers approximately $150,000 worth of market exposure.

It goes both ways. Gearing magnifies losses just as it magnifies gains.

Where it fits

The Index 150 SMA is an extension of the CFS SMA Suite beyond traditional growth profiles. It complements the existing Index, Flex and Apex ranges while offering competitive pricing through Accelerate 100, with zero platform administration fees.

Who it's for

Gearing belongs in the toolkit. The Index 150 SMA gives your clients increased market exposure and the compounding potential that comes with it — without complexity on your end.

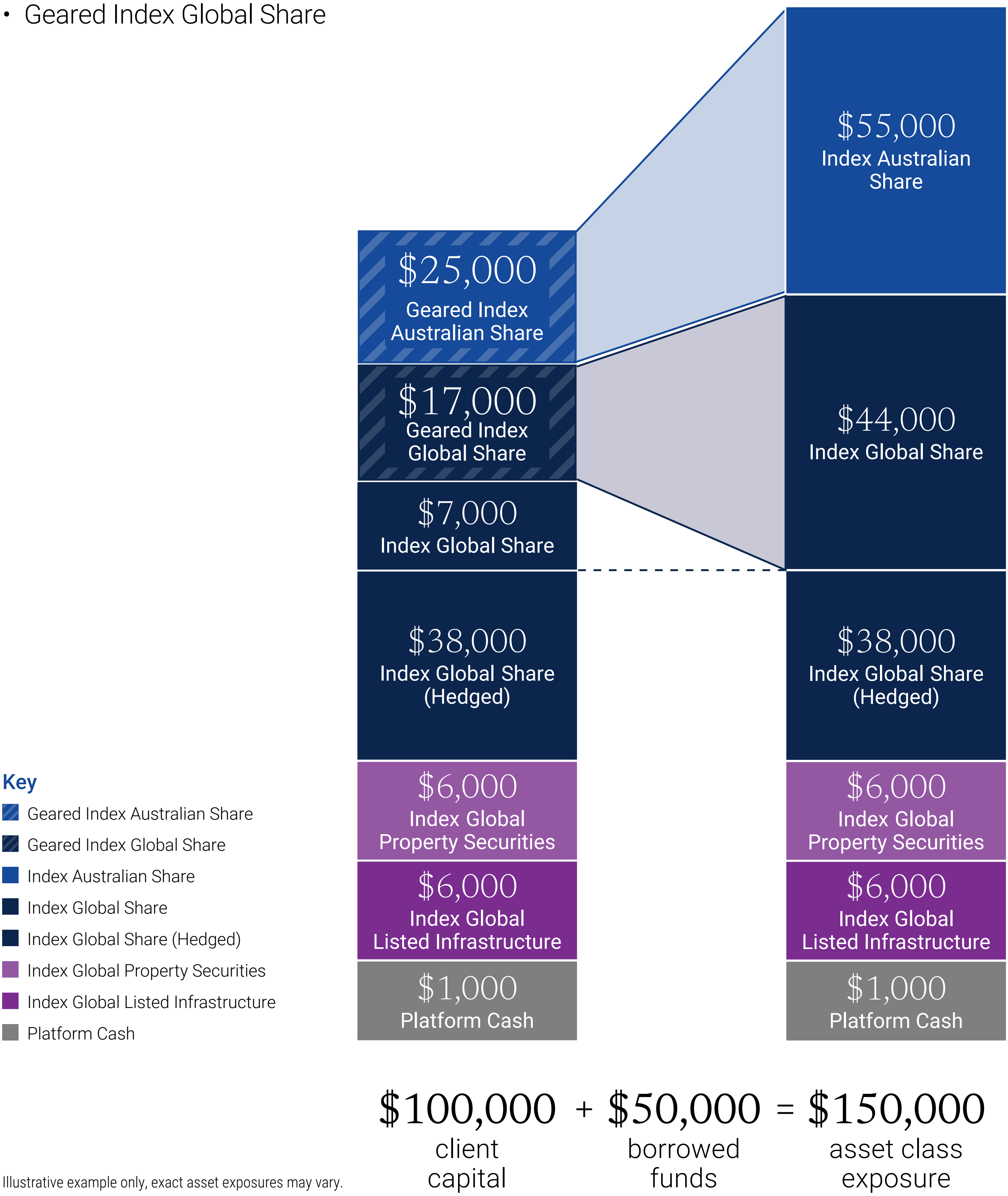
Best suited to investors with longer time horizons and higher risk tolerance. Not for short-term investors or those needing capital stability.

1 Morningstar Direct, Geared Funds Sector report (Australia), based on funds under management (FUM), as at 30 April 2026.

How it's built

This strategy provides increased equity exposure, delivering approximately $150,000 of market exposure for every $100,000 invested – through a diversified mix of index-based building blocks and select geared strategies:

- Geared Index Australian Share
- Geared Index Global Share



Illustrative example only, exact asset exposures may vary.

Asset allocation

Asset Class	Fund	Index	Capital fund weights	Typical asset class exposure post gearing
Australian Shares	CFS Geared Index Australian Share - Class A*	Solactive Australia 100 Index Total Return	25%	55%
Global Shares	CFS Geared Index Global Share - Class A*	MSCI All Country World ex Australia Net Index	17%	37%
	CFS Index Global Share - Class A	MSCI All Country World ex Australia Net Index	7%	7%
	CFS Index Global Share - Hedged - Class A	MSCI All Country World ex Australia Net Index Hedged AUD	38%	38%
Listed Real Assets	CFS Index Global Property Securities - Class A	FTSE EPRA/NAREIT Dev ex Aus Rental Net Index Hedged AUD	6%	6%
	CFS Index Global Listed Infrastructure Securities - Class A	FTSE Developed Core Infrastructure 50/50 Net Index Hedged AUD	6%	6%
Cash	Platform Cash	-	1%	1%
Total		**-**	**100%**	**150%**

* These building blocks have a target LVR of 55%, resulting in asset exposure of approximately 2.2x

The target asset allocation is only a guide, and actual allocations can change significantly and sometimes quickly.

Fund facts

Asset Class	Fund
Minimum suggested timeframe	7 Years
Minimum initial investment	$5,000
Asset class	Diversified
Portfolio code	EDGIL150
Standard risk measure	7 Low Medium High
Management fees & costs*	0.67%

* Read the PDS to learn more. Signature Managed Account Product Disclosure Statement.

To learn more about the CFS Index 150 SMA,
please contact your local Business Development Manager.

Contact now

call 13 18 36 (8:30am to 6pm Sydney time)

visit cfs.com.au/investments