

Colonial First State Wholesale Geared Index Global Share

Investment Option Profile - March 2022

	3 month (%)	6 month (%)	1 year (%) pa	3 years (%) pa	5 years (%) pa	10 years (%) pa	Since inception	Inception date	Fund size
Personal Super	-	-	-	-	-	-	-	Dec 2021	\$5.47m
Retirement	-	-	-	-	-	-	-	Dec 2021	\$4.06m
Benchmark^	-	-	-	-	-	-	-		

^ MSCI All Country World ex Australia Net Index (100%)

Past performance is not an indicator of future performance for this option or any other option available from Colonial First State.

For Options less than 12 months old, meaningful performance figures are not yet available.

All returns are calculated on an annualised basis using exit price to exit price with distributions reinvested, net of management costs, transaction costs and for FirstChoice Personal Super and FirstChoice Employer Super net of tax payable by the trustee. All return calculations exclude contribution surcharge, excess contribution tax or individual taxes payable by the investor and all other fees and rebates disclosed in the relevant Product Disclosure Statements (PDSs). For FirstChoice Investments, the 'distribution' component is the amount paid by the way of distribution, which may include net realised capital gains.

Please refer to the PDS for full details of the applicable fees, costs, and benchmarks.

Investment objective

To magnify long-term returns capital growth by borrowing to invest in a diversified portfolio of global shares. The option aims to outperform the MSCI All Country World (ex Australia) Index in Australian dollar terms over rolling seven-year periods before fees and taxes.

Investment strategy

This option uses detailed risk analysis to design a portfolio of shares that provides the greatest likelihood of matching the performance of the MSCI All Country World (ex Australia) Index. The option utilises gearing (borrowing) to magnify returns from underlying investments. The option does not hedge investors' capital but may hedge up to 100% of the currency exposure relating to the borrowings.

Investment category

Geared

Minimum suggested timeframe

At least 7 years

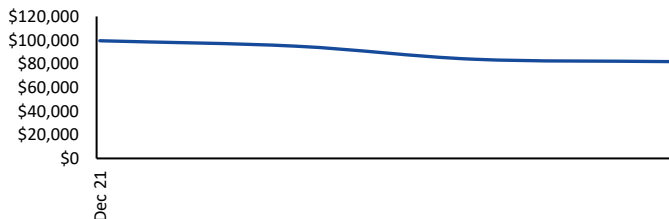
Portfolio holdings disclosure

The money in your investment option is invested across a range of assets. To see a full list of holdings for this option, please visit cfs.com.au/PHD

Investment ranges

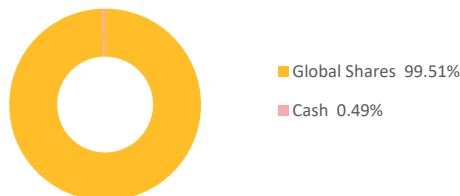
Asset class	Range	Benchmark
Global share	90% - 100%	100%
Cash	0% - 10%	0%

Performance chart (\$99,465 invested since inception)

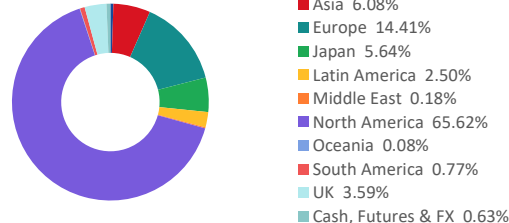


Colonial First State Wholesale Geared Index Global Share returns are calculated using exit price to exit price with distributions reinvested, net of management and transaction costs.

Asset allocation



Regional allocation



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