

## Investment objective

To provide capital growth and income over the long term. To outperform the option's composite benchmark over rolling three-year periods before fees and taxes.

## Investment strategy

The option is managed to sustainable investment criteria that encourages investment in companies with a sustainable business and strong environment, social and governance characteristics. It seeks to avoid investments in certain companies or activities that have a highly adverse effect on the environment or society.

## Investment ranges

Asset class	Range	Benchmark
Global shares and Private Equity	35% - 55%	50.0%
Australian shares	25% - 45%	30.0%
Global fixed interest	0% - 20%	10.0%
Australian fixed interest	0% - 20%	9.0%
Cash	0% - 10%	1.0%

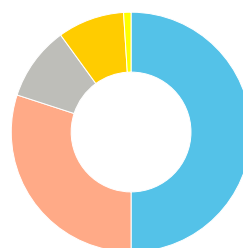
## Minimum suggested timeframe

At least 5 years

## Risk rating

Band 6 - High. The level of investment risk is the Trustee's estimate of the risk of negative returns over a 20 year period. It is not a complete assessment of all forms of investment risk. For more information about risk, refer to the Reference guide.

## What am I invested in?



- Global shares - 50.0%
- Australian shares - 30.0%
- Global fixed interest - 10.0%
- Australian fixed interest - 9.0%
- Cash - 1.0%

## Performance

	3 month (%)	6 month (%)	1 year (%)	3 years (%)	5 years (%)	10 years (%)	Since inception	Inception date	Fund size
<b>Net return</b>	5.93%	13.87%	14.16%	-	-	-	12.83%	21/11/2022	\$3.36m
<b>Benchmark<sup>A</sup></b>	7.46%	14.72%	17.15%	-	-	-	15.07%		

<sup>A</sup>S&P/ASX 300 Accumulation Index (30%); MSCI All Country World ex Australia Net Index (28%); MSCI All Country World ex Australia Net Index Hedged AUD (22%); Bloomberg Global-Aggregate Total Return Index Value Hedged AUD (10%); Bloomberg AusBond Composite 0+Yr Index (9%); Bloomberg AusBond Bank Bill Index (1%)

### Past Performance is no Indication of Future Performance

All returns are calculated on an annualised basis using exit price to exit price, net of administration and investment fees, costs and net of tax payable by the trustee. All return calculations exclude contribution surcharge, contribution tax or individual taxes payable by the investor and all other fees and rebates disclosed in the relevant product disclosure statements available on our website or by calling us. Please refer to the Product Disclosure Statement (PDS) and the Fees and Investments Reference Guide for full details of the applicable fees and costs.

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