

FirstChoice Investments*

Performance



* Closed to new accounts

March 2025

FirstChoice generally uses mandates for the single manager options rather than investing into each manager's unit trust. Therefore, the returns of the single manager options will not be identical to the returns of a similar unit trust offered by the manager.

Options	3 months	1 year	2 years pa*	3 years pa*	5 years pa*	7 years pa*	Since inception*	Inception date
CFS Multi-Manager Multi-Sector								
CFS Defensive	0.79%	3.99%	4.40%	2.75%	2.22%	2.02%	3.76%	15-May-02
CFS Conservative	0.53%	4.53%	5.77%	3.33%	4.19%	3.16%	4.23%	15-May-02
CFS Select Conservative (Closed to new investors)	0.27%	4.45%	5.78%	3.64%	4.20%	3.71%	4.20%	15-May-02
CFS Moderate	-0.28%	5.65%	8.49%	4.73%	7.59%	5.15%	5.24%	15-May-02
CFS Select Balanced (Closed to new investors)	-0.47%	5.02%	7.47%	4.65%	6.01%	4.98%	4.49%	15-May-02
CFS Balanced	-0.52%	5.89%	9.25%	5.04%	8.65%	5.74%	6.85%	2-Jun-09
CFS Growth	-0.80%	6.08%	9.96%	5.34%	9.73%	6.26%	5.64%	15-May-02
CFS High Growth	-1.45%	7.17%	11.73%	6.13%	12.13%	7.26%	5.76%	15-May-02
CFS Select Diversified (Closed to new investors)	-1.24%	5.56%	8.79%	5.34%	8.27%	6.41%	5.20%	15-May-02
CFS Select High Growth (Closed to new investors)	-2.91%	6.96%	13.53%	8.58%	13.77%	9.54%	6.58%	15-May-02
CFS Geared Growth Plus	-4.48%	7.39%	15.42%	5.54%	18.12%	8.47%	5.96%	20-May-08
CFS Multi-Manager Single-Sector								
CFS Fixed Interest	1.40%	3.17%	2.49%	0.75%	-0.10%	0.91%	3.79%	14-May-02
CFS Australian Share	-2.92%	2.45%	7.22%	4.44%	12.35%	6.59%	6.80%	15-May-02
CFS Australian Small Companies	0.79%	-1.63%	5.89%	-0.23%	13.50%	6.89%	9.26%	4-Mar-03
CFS Emerging Markets	2.69%	12.23%	10.61%	7.37%	5.97%	3.62%	6.02%	18-Nov-08
CFS Geared Australian Share	-8.79%	-2.57%	8.19%	2.48%	20.98%	7.17%	1.37%	1-May-07
CFS Geared Global Share	-3.09%	15.31%	26.92%	14.05%	19.18%	12.54%	4.77%	15-May-02
CFS Global Infrastructure Securities	5.84%	11.82%	7.29%	3.03%	9.13%	6.27%	5.91%	1-May-07
CFS Global Property Securities	-0.22%	3.39%	5.29%	-5.47%	4.54%	2.56%	1.85%	1-May-07
CFS Global Share	-1.67%	12.11%	19.70%	13.18%	13.94%	10.67%	4.92%	15-May-02
CFS Global Share - Hedged	-1.89%	6.75%	15.22%	6.33%	13.49%	7.18%	5.17%	7-Mar-06
CFS Property Securities	-5.83%	-5.61%	13.00%	3.17%	13.38%	6.88%	5.05%	15-May-02
CFS Enhanced Index Series								
CFS Enhanced Index Conservative	0.27%	4.81%	6.23%	3.83%	4.84%	3.58%	4.66%	1-Jun-09
CFS Enhanced Index Diversified	-0.32%	5.86%	8.53%	5.03%	7.56%	5.12%	6.13%	29-May-12
CFS Enhanced Index Balanced	-0.83%	7.02%	10.79%	6.29%	10.34%	6.58%	7.75%	1-Jun-09
CFS Enhanced Index Growth	-1.11%	7.44%	11.70%	6.86%	11.72%	7.26%	6.98%	23-May-17
CFS Enhanced Index High Growth	-1.66%	8.35%	13.57%	7.91%	14.22%	8.29%	8.02%	17-May-14
CFS Index Series								
CFS Index Australian Share	-2.89%	2.33%	7.98%	4.96%	12.62%	7.89%	7.32%	15-May-02
CFS Index Global Share	-2.01%	11.90%	18.92%	13.64%	14.82%	12.50%	6.20%	15-May-02
CFS Index Global Share - Hedged	-2.18%	6.65%	14.50%	6.54%	14.40%	8.85%	7.22%	6-Mar-06
CFS Index Property Securities	-6.86%	-5.72%	13.21%	3.22%	13.16%	6.63%	4.41%	7-Oct-04
Single-Manager Multi-Sector								
Conservative								
Perpetual Conservative Growth	0.21%	3.33%	4.34%	3.12%	3.92%	3.28%	4.36%	15-May-02
Moderate								
Perpetual Diversified Growth	-0.14%	3.05%	5.11%	3.95%	6.07%	4.53%	4.89%	15-May-02
Growth								
Pendal Sustainable Balanced	-4.51%	2.07%	6.97%	2.63%	-	-	0.30%	13-Dec-21
Perpetual Balanced Growth	-0.85%	2.84%	6.12%	4.72%	8.44%	5.73%	5.57%	15-May-02
Diversified Real Return								
Schroder Real Return	0.27%	6.55%	7.80%	5.16%	4.96%	3.67%	3.70%	19-May-14
Alternative Income								
Pendal Monthly Income Plus	1.21%	6.41%	5.53%	3.69%	2.79%	2.65%	2.71%	5-Oct-16

Options	3 months	1 year	2 years pa*	3 years pa*	5 years pa*	7 years pa*	Since inception*	Inception date
Single Manager Single-Sector								
Enhanced Cash								
First Sentier Strategic Cash	1.15%	4.78%	4.68%	3.86%	2.33%	1.91%	3.02%	14-May-02
Short Duration Fixed Interest								
Daintree Core Income	1.27%	-	-	-	-	-	5.14%	17-Jun-24
Janus Henderson Diversified Credit	1.41%	-	-	-	-	-	5.49%	17-Jun-24
Kapstream Absolute Return Income	1.33%	6.32%	5.70%	4.08%	2.60%	2.42%	2.56%	20-May-14
Macquarie Income Opportunities	1.21%	4.96%	4.82%	3.34%	2.46%	1.74%	3.13%	2-Jun-09
PM Capital Enhanced Yield	1.04%	5.28%	5.72%	4.60%	4.06%	2.89%	3.97%	6-Oct-04
Perpetual Diversified Income	1.14%	5.89%	6.78%	5.17%	4.45%	2.99%	3.09%	29-May-12
Schroder Absolute Return Income	1.25%	6.08%	5.78%	4.12%	2.80%	2.54%	3.51%	5-May-04
Diversified Fixed Interest								
Macquarie Dynamic Bond	1.14%	-	-	-	-	-	3.59%	17-Jun-24
PIMCO Global Bond	1.41%	3.55%	3.55%	0.16%	0.16%	0.65%	1.90%	12-Jun-13
UBS Diversified Fixed Income	1.32%	3.94%	2.95%	0.94%	-0.54%	0.70%	3.02%	2-Jun-09
Australian Fixed Interest								
PIMCO Australian Bond	1.38%	3.26%	2.61%	1.77%	-	-	-1.13%	30-Nov-20
Alternatives								
Aspect Diversified Futures	-3.99%	-15.49%	3.83%	6.85%	8.72%	6.49%	6.11%	23-Mar-10
Lower Volatility Share								
Merlon Australian Share Income	1.16%	0.84%	7.88%	7.36%	12.42%	5.86%	4.46%	20-May-08
AB Managed Volatility Equities	2.25%	7.54%	6.02%	-	-	-	6.89%	21-Nov-22
State Street Australian Equity	-0.66%	0.57%	2.63%	1.32%	6.39%	3.73%	3.52%	23-May-17
Australian Share								
Acadian Core Australian Equity	-2.96%	6.30%	10.36%	6.72%	14.25%	9.00%	5.85%	7-Mar-06
Airlie Australian Share	-3.94%	-4.02%	-	-	-	-	7.62%	20-Nov-23
Ausbil Active Sustainable Equity	-3.27%	5.77%	11.70%	4.82%	-	-	4.33%	13-Dec-21
Ausbil Australian Active Equity	-5.60%	-2.58%	5.14%	3.16%	14.21%	8.20%	7.52%	1-Jun-05
Bennelong Ex-20 Australian Equities	-13.33%	-13.41%	1.20%	-4.70%	7.33%	3.26%	6.86%	19-May-15
DNR Capital Australian Equities Income	-4.05%	-3.93%	-	-	-	-	5.65%	20-Nov-23
Fidelity Australian Equities	-2.81%	0.54%	5.37%	2.33%	11.81%	7.32%	7.79%	1-Aug-09
First Sentier Imputation	-5.42%	1.53%	9.26%	5.20%	13.24%	9.09%	7.48%	15-May-02
Investors Mutual Australian Share	-0.24%	2.11%	4.83%	4.43%	9.79%	5.42%	6.73%	5-May-04
Lazard Select Australian Equity	-1.70%	-7.76%	2.37%	4.86%	14.07%	5.94%	5.40%	19-May-15
Martin Currie Australia Equity Income	1.00%	-	-	-	-	-	7.23%	17-Jun-24
Pendal Australian Share	-2.42%	4.22%	8.62%	5.34%	12.91%	7.61%	7.53%	15-May-02
Pendal Sustainable Australian Share	-1.91%	5.80%	10.53%	5.10%	-	-	6.97%	30-Nov-20
Perennial Value Australian Share	-4.32%	-0.40%	4.56%	2.82%	13.56%	6.34%	6.79%	5-May-04
Perpetual Australian Share	-4.04%	-3.59%	2.31%	2.60%	12.95%	6.47%	7.63%	29-May-12
Perpetual Industrial Share	-3.90%	4.45%	11.81%	8.96%	14.44%	7.42%	7.64%	15-May-02
Platypus Australian Equities	-10.86%	-	-	-	-	-	-12.53%	18-Nov-24
RQI Australian Value	-1.11%	3.61%	9.42%	6.84%	15.28%	9.04%	9.15%	18-Nov-08
Schroder Australian Equity	-0.69%	1.10%	6.56%	4.58%	12.95%	7.23%	7.36%	15-May-02
Solaris Core Australian Equity	-3.20%	2.71%	8.50%	5.31%	12.17%	6.99%	6.81%	12-Apr-11
WaveStone Australian Share	-5.71%	-1.92%	5.85%	4.01%	-	-	4.87%	18-Jun-21
Australian Share – Small Companies								
Ausbil Australian Emerging Leaders	-4.14%	1.03%	8.31%	0.66%	15.57%	5.78%	4.97%	1-May-07
Celeste Australian Small Companies	-2.90%	-6.02%	4.68%	-1.84%	10.70%	3.50%	5.79%	1-Jun-05
Investors Mutual Future Leaders	-1.60%	-	-	-	-	-	6.99%	17-Jun-24
Longwave Australian Small Companies	-2.19%	-	-	-	-	-	-1.13%	1-Aug-24
OC Premium Small Companies	-10.06%	-11.22%	4.59%	1.94%	13.34%	5.04%	6.76%	19-May-15
RQI Australian Small Cap Value	-0.76%	5.56%	10.73%	4.24%	15.08%	6.82%	9.54%	18-Nov-08
Global Share								
Acadian Global Equity	-4.48%	10.43%	19.96%	15.38%	17.03%	13.48%	7.86%	1-Jun-05
Antipodes Global	7.27%	15.43%	12.00%	13.28%	10.40%	-	7.14%	15-May-18
Baillie Gifford Long Term Global Growth	-6.58%	12.55%	20.34%	9.79%	12.25%	-	15.46%	23-Oct-18
Barrow Hanley Concentrated Global Share	3.06%	8.28%	-	-	-	-	13.14%	20-Nov-23
Barrow Hanley Global Share	4.84%	14.70%	16.08%	13.92%	14.34%	10.97%	5.44%	15-May-02
Epoch Global Equity Shareholder Yield	3.56%	15.61%	16.59%	13.70%	12.97%	9.67%	8.63%	17-May-14
Generation Global Share (Closed to new investors)	-2.78%	4.96%	15.90%	9.15%	12.83%	11.57%	10.30%	4-Sep-07

Options	3 months	1 year	2 years pa*	3 years pa*	5 years pa*	7 years pa*	Since inception*	Inception date
MFS Global Equity	0.30%	5.73%	10.06%	8.65%	10.49%	9.49%	10.74%	1-Jun-09
Magellan Global Share	-2.25%	10.22%	18.61%	13.96%	9.23%	11.07%	13.51%	12-Apr-11
RQI Global Value	2.92%	14.66%	21.45%	16.48%	17.11%	11.46%	9.94%	18-Nov-08
RQI Global Value - Hedged	2.16%	9.32%	17.44%	10.28%	17.46%	8.62%	10.82%	18-Nov-08
Royal London Concentrated Global Share	-1.45%	8.78%	24.04%	19.36%	-	-	16.59%	13-Dec-21
Stewart Investors Worldwide Leaders Sustainability	-0.15%	10.46%	15.17%	12.43%	12.18%	10.85%	4.95%	15-May-02
T. Rowe Price Global Equity	-4.80%	7.60%	17.67%	10.35%	11.95%	11.33%	12.33%	17-May-16
Global Share – Emerging Markets								
Platinum Asia	1.61%	14.54%	7.49%	7.07%	6.27%	4.90%	7.61%	23-Mar-10
Skerryvore Global Emerging Markets All-Cap	2.70%	-	-	-	-	-	5.82%	18-Nov-24
Specialist Share								
Acadian Australian Equity Long Short	-3.62%	9.73%	12.48%	9.16%	16.69%	9.98%	6.79%	7-Mar-06
Acadian Global Equity Long Short	-1.81%	4.94%	23.96%	22.49%	24.71%	18.12%	9.58%	1-May-07
CFS - Wellington Global Small Companies	-4.31%	4.24%	11.99%	9.19%	12.76%	7.06%	7.33%	5-May-04
Janus Henderson Global Natural Resources	4.46%	-0.12%	2.42%	0.51%	12.43%	-	5.34%	15-May-18
PM Capital Global Companies	7.93%	13.07%	18.73%	15.42%	23.53%	13.45%	9.14%	7-Mar-06
Platinum International	0.60%	1.48%	3.23%	7.73%	7.48%	4.35%	7.72%	10-Jan-03
Australian Property and Infrastructure Securities								
Dexus AREIT (Closed to new investors)	-1.99%	-3.01%	10.69%	1.23%	10.82%	3.70%	2.64%	17-May-16
First Sentier Property Securities	-7.31%	-6.53%	12.97%	3.47%	13.74%	7.42%	4.69%	15-May-02
Ironbark Property Securities	-7.27%	-8.20%	12.23%	1.79%	12.67%	7.10%	5.33%	15-May-02
Martin Currie Real Income	-0.55%	2.36%	5.74%	0.95%	8.60%	4.39%	4.78%	25-Oct-16
Pendal Property Investment	-7.35%	-6.09%	12.08%	2.91%	12.44%	7.59%	6.02%	15-May-02
Global Property and Infrastructure Securities								
ClearBridge RARE Infrastructure Value	4.97%	-	-	-	-	-	3.08%	18-Nov-24
First Sentier Global Property Securities	-1.27%	-0.33%	3.20%	-6.66%	3.68%	1.89%	5.32%	7-Oct-04
Macquarie Global Listed Real Estate	-0.25%	2.26%	4.61%	-5.66%	4.41%	1.95%	4.77%	12-Apr-11
Magellan Infrastructure	4.13%	8.90%	5.20%	1.38%	6.01%	4.53%	4.89%	17-May-16
Geared								
Acadian Geared Core Australian Equity	-9.95%	-	-	-	-	-	-12.50%	18-Nov-24
Acadian Geared Global Equity	-10.71%	6.57%	30.58%	15.37%	29.14%	18.23%	8.18%	1-May-07
CFS Geared Share	-10.62%	1.39%	14.08%	5.14%	23.61%	14.56%	11.07%	15-May-02
First Sentier Geared Global Property Securities (Closed to new investors)	-4.21%	-11.60%	-2.52%	-23.69%	-0.90%	-4.59%	-5.82%	1-May-07

We're here to help

If you have any questions on the forms please contact your local Business Development team or call us on 1300 769 619 Monday to Friday between 8:30am and 6pm

* Returns are calculated on a cumulative year-on-year basis which are then annualised. For funds that have been in existence for less than one year, the since inception performance is actual performance since inception and not annualised. Calculations are based on exit price to exit price with distributions reinvested, after ongoing fees and expenses but excluding individual tax, member fees and entry fees (if applicable). Past performance is no indication of future performance.

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