

FirstChoice Wholesale Investments Performance



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	0.81%	4.03%	4.43%	2.77%	2.28%	2.27%	4.40%	3-May-02
CFS Conservative	0.53%	4.56%	5.80%	3.36%	4.25%	3.44%	4.85%	24-Apr-02
CFS Select Conservative (Closed to new investors)	0.26%	4.48%	5.81%	3.66%	4.26%	4.04%	5.80%	3-Jul-96
CFS Diversified	-0.04%	5.42%	7.78%	4.45%	6.61%	4.90%	4.63%	19-May-15
CFS Moderate	-0.27%	5.68%	8.53%	4.76%	7.66%	5.47%	5.90%	24-Apr-02
CFS Real Return	0.68%	-	-	-	-	-	1.83%	18-Nov-24
CFS Select Balanced (Closed to new investors)	-0.46%	5.06%	7.51%	4.67%	6.08%	5.32%	6.04%	20-Jun-97
CFS Balanced	-0.51%	5.94%	9.30%	5.07%	8.73%	6.06%	7.64%	1-Jun-09
CFS Growth	-0.81%	6.11%	10.00%	5.37%	9.80%	6.59%	6.30%	24-Apr-02
CFS High Growth	-1.45%	7.21%	11.77%	6.16%	12.21%	7.60%	6.53%	10-May-02
CFS Select Diversified (Closed to new investors)	-1.24%	5.59%	8.84%	5.38%	8.35%	6.77%	7.31%	21-Jul-95
CFS Select High Growth (Closed to new investors)	-2.92%	7.00%	13.58%	8.61%	13.88%	9.88%	7.69%	21-Mar-99
CFS Geared Growth Plus	-4.55%	7.33%	15.42%	5.56%	18.25%	9.03%	7.08%	20-May-08
CFS Multi-Manager Single-Sector								
CFS Enhanced Cash	1.16%	4.77%	-	-	-	-	4.80%	22-May-23
CFS Wholesale Cash	1.24%	5.14%	5.06%	4.22%	2.70%	2.51%	2.83%	2-Nov-11
CFS Fixed Interest	1.41%	3.21%	2.52%	0.77%	-0.06%	1.16%	4.44%	18-Apr-02
CFS Australian Share	-2.92%	2.47%	7.25%	4.46%	12.43%	6.90%	7.39%	24-Apr-02
CFS Australian Small Companies	0.79%	-1.61%	5.93%	-0.23%	13.57%	7.19%	10.02%	1-Mar-03
CFS Emerging Markets	2.71%	12.29%	10.65%	7.41%	6.04%	3.90%	3.05%	20-May-08
CFS Geared Australian Share	-8.78%	-2.52%	8.22%	2.51%	21.06%	7.89%	2.60%	1-May-07
CFS Geared Global Share	-3.11%	15.35%	26.98%	14.05%	19.27%	12.88%	5.49%	5-Sep-01
CFS Global Infrastructure Securities	5.85%	11.87%	7.33%	3.06%	9.20%	6.58%	7.66%	30-Mar-06
CFS Global Property Securities	-0.23%	3.42%	5.32%	-5.47%	4.61%	2.85%	4.82%	5-Jun-05
CFS Global Share	-1.66%	12.15%	19.76%	13.22%	14.02%	10.99%	5.41%	24-Apr-02
CFS Global Share - Hedged	-1.90%	6.77%	15.26%	6.36%	13.60%	7.51%	6.75%	11-May-05
CFS Property Securities	-5.83%	-5.59%	13.04%	3.19%	13.46%	7.16%	5.76%	24-Apr-02
CFS Enhanced Index Series								
CFS Enhanced Index Conservative	0.28%	4.85%	6.27%	3.86%	4.90%	3.86%	5.27%	1-Jun-09
CFS Enhanced Index Diversified	-0.31%	5.90%	8.57%	5.06%	7.63%	5.41%	6.69%	29-May-12
CFS Enhanced Index Moderate	-0.52%	6.53%	9.76%	5.78%	9.08%	6.22%	5.91%	19-May-15
CFS Enhanced Index Balanced	-0.83%	7.06%	10.84%	6.33%	10.42%	6.89%	8.39%	1-Jun-09
CFS Enhanced Index Growth	-1.10%	7.48%	11.75%	6.89%	11.80%	7.57%	7.35%	23-May-17
CFS Enhanced Index High Growth	-1.67%	8.38%	13.64%	7.96%	14.33%	8.61%	8.54%	17-May-14
CFS Index Series								
CFS Index Conservative	0.32%	4.69%	5.73%	3.43%	4.29%	-	3.60%	4-Jun-19
CFS Indexed Australian Bond	1.24%	2.97%	2.08%	1.43%	-0.75%	1.31%	3.95%	14-Jul-04
CFS Index Diversified	-0.29%	5.37%	7.53%	4.11%	6.46%	-	4.96%	4-Jun-19
CFS Index Global Bond	1.08%	3.35%	2.74%	-0.17%	-1.21%	-	0.88%	15-May-18
CFS Index Moderate	-0.54%	5.65%	8.36%	4.58%	-	-	5.90%	9-Jun-20
CFS Index Balanced	-0.84%	5.96%	9.21%	4.91%	-	-	6.72%	9-Jun-20
CFS Index Growth	-1.15%	6.26%	10.06%	5.30%	10.07%	-	7.15%	4-Jun-19
CFS Index High Growth	-1.71%	6.88%	11.67%	5.98%	-	-	9.41%	9-Jun-20
CFS Geared Index Australian Share	-8.64%	-2.79%	10.54%	5.33%	-	-	7.12%	13-Dec-21
CFS Geared Index Global Share	-6.06%	18.25%	35.45%	23.55%	-	-	14.08%	13-Dec-21
CFS Index Australian Share	-2.87%	2.36%	8.02%	4.99%	12.69%	8.18%	8.00%	14-Jul-04
CFS Index Global Listed Infrastructure Securities	5.01%	15.57%	8.49%	1.63%	7.87%	5.83%	8.80%	1-Oct-12
CFS Index Global Property Securities	0.87%	4.83%	5.32%	-5.00%	5.46%	2.05%	8.56%	2-Jun-09

Options	3 months	1 year	2 years pa*	3 years pa*	5 years pa*	7 years pa*	Since inception*	Inception date
CFS Index Global Share	-2.00%	11.97%	18.98%	13.69%	14.93%	12.88%	8.63%	14-Jul-04
CFS Index Global Share - Hedged	-2.17%	6.68%	14.54%	6.56%	14.48%	9.19%	7.82%	25-Feb-06
CFS Index Property Securities	-6.86%	-5.68%	13.26%	3.29%	13.25%	6.91%	5.16%	14-Jul-04
Single-Manager Multi-Sector								
Conservative								
AZ Sestante Conservative	0.78%	4.45%	6.07%	3.87%	4.23%	3.50%	3.74%	5-Dec-16
Context Capital Short Term	0.91%	4.99%	-	-	-	-	5.06%	22-May-23
Perpetual Conservative Growth	0.23%	3.37%	4.38%	3.15%	3.97%	3.49%	4.86%	24-Apr-02
Moderate								
AZ Sestante Diversified	0.26%	4.61%	7.09%	4.30%	5.42%	4.21%	4.61%	5-Dec-16
Context Capital Medium Term	-0.14%	4.40%	-	-	-	-	7.42%	22-May-23
Evidentia Medium Term	-0.23%	4.66%	-	-	-	-	8.35%	22-May-23
Perpetual Diversified Growth	-0.14%	3.07%	5.13%	3.98%	6.13%	4.76%	5.39%	24-Apr-02
Growth								
Pendal Sustainable Balanced	-4.51%	2.10%	7.03%	2.67%	-	-	0.33%	13-Dec-21
Perpetual Balanced Growth	-0.85%	2.86%	6.14%	4.75%	8.50%	5.99%	6.10%	24-Apr-02
Diversified Real Return								
Drummond Dynamic Plus	-2.95%	1.15%	-	-	-	-	2.86%	18-Mar-24
Perpetual Diversified Real Return	0.60%	4.20%	4.56%	3.18%	4.31%	3.41%	3.17%	2-Nov-17
Schroder Real Return	0.28%	6.61%	7.86%	5.23%	5.03%	3.80%	3.88%	20-May-14
High Growth								
AZ Sestante Growth	-0.58%	4.54%	9.24%	5.31%	8.51%	5.62%	6.11%	5-Dec-16
Context Capital Long Term	-1.82%	5.13%	-	-	-	-	11.96%	22-May-23
Evidentia Long Term	-1.69%	5.01%	-	-	-	-	12.36%	22-May-23
Alternative Income								
Pendal Monthly Income Plus	1.22%	6.44%	5.55%	3.72%	2.84%	2.94%	3.09%	5-Oct-16
Single Manager Single-Sector								
Cash and Deposits								
FirstRate Cash	1.16%	4.89%	4.78%	-	-	-	4.65%	21-Nov-22
FirstRate Cash Non-Auto-rebalancing	1.17%	4.93%	-	-	-	-	4.81%	20-Nov-23
Enhanced Cash								
First Sentier Strategic Cash	1.16%	4.80%	4.70%	3.89%	2.38%	2.15%	3.80%	1-Jun-98
Short Duration Fixed Interest								
Daintree Core Income	1.27%	-	-	-	-	-	5.15%	17-Jun-24
Franklin Australian Absolute Return Bond	1.23%	5.65%	4.98%	3.43%	-	-	2.24%	13-Dec-21
Janus Henderson Diversified Credit	1.42%	-	-	-	-	-	5.51%	17-Jun-24
Kapstream Absolute Return Income	1.33%	6.34%	5.72%	4.10%	2.63%	2.51%	2.71%	19-May-14
Macquarie Income Opportunities	1.21%	4.98%	4.83%	3.36%	2.50%	2.01%	3.73%	1-Jun-09
Mutual Income	1.05%	5.94%	-	-	-	-	6.20%	22-May-23
PM Capital Enhanced Yield	1.05%	5.31%	5.71%	4.59%	4.08%	3.05%	4.32%	29-Sep-04
Perpetual Diversified Income	1.15%	5.90%	6.79%	5.18%	4.48%	3.26%	3.73%	20-May-11
Schroder Absolute Return Income	1.25%	6.09%	5.78%	4.13%	2.84%	2.81%	4.16%	26-Apr-04
Yarra Enhanced Income	1.34%	7.64%	-	-	-	-	8.40%	20-Nov-23
Diversified Fixed Interest								
Bentham Global Income	1.31%	4.61%	-	-	-	-	5.92%	22-May-23
Brandywine Global Income Optimiser	1.82%	3.17%	3.85%	0.87%	-	-	-0.54%	13-Dec-21
Colchester Emerging Market Bond	3.02%	-	-	-	-	-	4.05%	18-Nov-24
Colchester Global Government Bond	2.76%	2.07%	1.32%	-0.31%	-	-	-1.82%	30-Nov-20
Fortlake Real Income	2.49%	-	-	-	-	-	3.11%	18-Nov-24
Macquarie Dynamic Bond	1.15%	-	-	-	-	-	3.61%	17-Jun-24
MetLife Global Impact Bond	1.01%	2.91%	2.45%	-0.61%	-1.18%	-	0.21%	15-May-18
PIMCO Diversified Fixed Interest	1.40%	3.43%	3.09%	0.98%	-	-	-0.82%	13-Dec-21
PIMCO Global Bond	1.41%	3.55%	3.56%	0.16%	0.19%	0.91%	2.17%	9-May-13
T. Rowe Price Dynamic Global Bond	1.92%	5.73%	0.69%	-	-	-	0.91%	21-Nov-22
UBS Diversified Fixed Income	1.32%	3.94%	2.95%	0.95%	-0.51%	0.97%	3.58%	1-Jul-09
Australian Fixed Interest								
Janus Henderson Tactical Income	1.29%	5.07%	5.70%	-	-	-	5.66%	21-Nov-22
Macquarie Australian Fixed Interest	1.28%	-	-	-	-	-	3.43%	17-Jun-24
PIMCO Australian Bond	1.39%	3.28%	2.63%	1.79%	-	-	-1.11%	30-Nov-20
Pendal Sustainable Australian Fixed Interest	1.46%	2.95%	2.44%	1.51%	-	-	-0.51%	13-Dec-21

Options	3 months	1 year	2 years pa*	3 years pa*	5 years pa*	7 years pa*	Since inception*	Inception date
Western Asset Australian Bond	1.26%	3.35%	2.49%	-	-	-	3.66%	21-Nov-22
Alternatives								
Acadian Defensive Income	-1.06%	9.63%	7.63%	6.83%	4.27%	3.14%	3.56%	7-May-08
Acadian Wholesale Australian Market Neutral Fund	-1.87%	11.32%	8.60%	8.91%	5.92%	3.52%	4.07%	1-Sep-14
Aspect Absolute Return	-0.33%	-1.78%	7.44%	7.36%	-	-	7.34%	30-Nov-20
Aspect Diversified Futures	-3.97%	-15.42%	3.93%	6.92%	8.81%	6.81%	6.68%	23-Mar-10
Blackrock Global Liquid Alternatives	2.37%	-	-	-	-	-	2.88%	18-Nov-24
Lower Volatility Share								
Merlon Australian Share Income	1.18%	0.86%	7.91%	7.39%	12.48%	6.14%	4.96%	20-May-08
AB Managed Volatility Equities	2.27%	7.58%	6.06%	-	-	-	6.93%	21-Nov-22
Acadian Global Managed Volatility Equity	3.30%	17.31%	17.11%	14.06%	12.50%	10.01%	11.35%	12-Jun-13
State Street Australian Equity	-0.65%	0.60%	2.66%	1.35%	6.46%	4.03%	3.88%	23-May-17
Australian Share								
Acadian Core Australian Equity	-2.96%	6.34%	10.41%	6.76%	14.34%	9.28%	6.85%	16-Nov-05
Airlie Australian Share	-3.94%	-4.02%	-	-	-	-	7.65%	20-Nov-23
Alphinity Sustainable Share	-2.39%	4.94%	9.49%	4.96%	-	-	7.87%	30-Nov-20
Antares Ex-20 Australian Equities	-4.44%	-0.84%	-	-	-	-	9.64%	20-Nov-23
Ausbil Active Sustainable Equity	-3.27%	5.79%	11.74%	4.84%	-	-	4.35%	13-Dec-21
Ausbil Australian Active Equity	-5.60%	-2.56%	5.18%	3.20%	14.30%	8.53%	8.23%	1-Jun-05
Bennelong Ex-20 Australian Equities	-13.35%	-13.42%	1.23%	-4.68%	7.22%	3.23%	6.93%	19-May-15
DNR Capital Australian Equities High Conviction	-6.13%	-2.62%	4.20%	-	-	-	4.25%	21-Nov-22
DNR Capital Australian Equities Income	-4.06%	-3.91%	-	-	-	-	5.69%	20-Nov-23
Fidelity Australian Equities	-2.80%	0.57%	5.40%	2.36%	11.89%	7.63%	8.44%	1-Aug-09
First Sentier Australian Share Fund	-8.53%	-0.77%	10.04%	3.68%	12.46%	9.33%	9.78%	1-Jan-94
First Sentier Australian Share Growth Fund	-5.17%	1.86%	8.65%	4.98%	13.03%	8.94%	9.26%	3-Nov-97
First Sentier Concentrated Australian Share	-8.77%	-1.43%	9.74%	3.43%	12.20%	9.25%	11.07%	21-Dec-94
First Sentier Imputation	-5.43%	1.55%	9.30%	5.21%	13.31%	9.43%	10.58%	1-Jan-94
Infinity Core Australian Equity	-5.09%	-0.35%	-	-	-	-	2.16%	15-Mar-24
Investors Mutual Australian Share	-0.24%	2.14%	4.87%	4.46%	9.85%	5.67%	7.22%	28-Apr-04
Lazard Select Australian Equity	-1.68%	-7.74%	2.41%	4.90%	14.15%	6.25%	5.88%	19-May-15
Martin Currie Australia Equity Income	1.03%	-	-	-	-	-	7.29%	17-Jun-24
Pendal Australian Share	-2.41%	4.24%	8.66%	5.37%	12.99%	7.94%	8.03%	24-Apr-02
Pendal Sustainable Australian Share	-1.90%	5.83%	10.58%	5.14%	-	-	7.01%	30-Nov-20
Perennial Value Australian Share	-4.33%	-0.40%	4.58%	2.83%	13.63%	6.65%	7.36%	26-Apr-04
Perpetual Australian Share	-4.05%	-3.57%	2.33%	2.61%	13.02%	6.71%	7.94%	18-Apr-02
Perpetual Industrial Share	-3.91%	4.47%	11.85%	8.99%	14.51%	7.67%	8.14%	24-Apr-02
Platypus Australian Equities	-10.87%	-	-	-	-	-	-12.54%	18-Nov-24
RQI Australian Value	-1.09%	3.66%	9.47%	6.88%	15.35%	9.35%	9.71%	18-Nov-08
Schroder Australian Equity	-0.68%	1.12%	6.61%	4.61%	13.03%	7.55%	7.93%	24-Apr-02
Solaris Core Australian Equity	-3.20%	2.74%	8.54%	5.35%	12.26%	7.33%	7.47%	9-Apr-11
WaveStone Australian Share	-5.72%	-1.90%	5.88%	4.04%	-	-	4.90%	18-Jun-21
Australian Share – Small Companies								
Ausbil Australian Emerging Leaders	-4.14%	1.07%	8.36%	0.68%	15.68%	6.08%	5.54%	17-Apr-07
Celeste Australian Small Companies	-2.90%	-6.01%	4.71%	-1.83%	10.77%	3.74%	6.34%	11-May-05
Eiger Australian Small Companies	-5.42%	-4.92%	2.80%	-2.53%	-	-	-4.85%	13-Dec-21
First Sentier Australian Small Companies	0.91%	0.17%	6.36%	1.15%	13.65%	9.33%	10.49%	1-Jan-94
Infinity SMID Australian Equity	-0.29%	6.90%	-	-	-	-	8.94%	15-Mar-24
Investors Mutual Future Leaders	-1.59%	-	-	-	-	-	7.02%	17-Jun-24
Longwave Australian Small Companies	-2.21%	-	-	-	-	-	-1.12%	1-Aug-24
OC Premium Small Companies	-10.10%	-11.25%	4.52%	1.91%	13.31%	5.04%	6.85%	19-May-15
RQI Australian Small Cap Value	-0.76%	5.57%	10.74%	4.28%	15.13%	7.13%	10.23%	18-Nov-08
Global Share								
Acadian Global Equity	-4.49%	10.45%	20.01%	15.42%	17.11%	13.80%	8.55%	1-Jun-05
Antipodes Global	7.28%	15.44%	12.01%	13.30%	10.43%	-	7.28%	15-May-18
Baillie Gifford Long Term Global Growth	-6.61%	12.52%	20.34%	9.77%	12.29%	-	15.73%	23-Oct-18
Baillie Gifford Sustainable Growth	-6.55%	3.25%	9.13%	1.94%	-	-	-2.06%	30-Nov-20
Barrow Hanley Concentrated Global Share	3.06%	8.28%	-	-	-	-	13.16%	20-Nov-23
Barrow Hanley Global Share	4.84%	14.73%	16.11%	13.95%	14.41%	11.22%	5.82%	24-Apr-02
Capital Group New Perspective	-3.07%	-	-	-	-	-	2.17%	18-Nov-24
Capital Group New Perspective - Hedged	-3.54%	-	-	-	-	-	-1.75%	18-Nov-24

Options	3 months	1 year	2 years pa*	3 years pa*	5 years pa*	7 years pa*	Since inception*	Inception date
Epoch Global Equity Shareholder Yield	3.57%	15.62%	16.61%	13.71%	13.03%	9.98%	9.15%	17-May-14
GQG Partners Global Equity	-1.48%	3.95%	24.13%	-	-	-	19.34%	21-Nov-22
GQG Partners Global Equity - Hedged	-1.65%	-1.12%	-	-	-	-	17.14%	20-Nov-23
Generation Global Share (Closed to new investors)	-2.79%	4.96%	15.92%	9.15%	12.88%	11.75%	10.64%	4-Sep-07
Generation Global Share - Hedged	-3.19%	-	-	-	-	-	-3.10%	31-Aug-24
Hyperion Global Growth Companies	-11.60%	17.11%	29.20%	14.31%	-	-	7.12%	13-Dec-21
Intermede Global Equities	-5.69%	0.48%	10.49%	-	-	-	12.13%	21-Nov-22
MFS Global Equity	0.31%	5.73%	10.08%	8.66%	10.56%	9.81%	11.39%	1-Jun-09
Magellan Global Share	-2.26%	10.19%	18.60%	13.95%	9.28%	11.30%	14.09%	11-Apr-11
Magellan Global Share - Hedged	-2.20%	4.57%	13.36%	6.07%	8.56%	7.10%	8.55%	17-May-16
Nanuk New World	-4.55%	3.62%	13.40%	-	-	-	15.37%	21-Nov-22
Pendal Global Select	-10.27%	-0.52%	11.13%	4.02%	-	-	-1.73%	13-Dec-21
RQI Global Value	2.92%	14.73%	21.52%	16.55%	17.21%	11.80%	10.62%	18-Nov-08
RQI Global Value - Hedged	2.17%	9.37%	17.48%	10.32%	17.54%	8.94%	11.41%	18-Nov-08
Royal London Concentrated Global Share	-1.45%	8.79%	24.07%	19.39%	-	-	16.61%	13-Dec-21
Royal London Core Global Share	-2.99%	7.58%	-	-	-	-	18.41%	20-Nov-23
Stewart Investors Worldwide Leaders Sustainability	-0.15%	10.47%	15.19%	12.46%	12.26%	11.19%	6.63%	31-Jul-97
T. Rowe Price Global Equity	-4.81%	7.58%	17.68%	10.35%	12.00%	11.63%	12.75%	17-May-16
T. Rowe Price Global Equity - Hedged	-4.66%	2.12%	12.65%	3.10%	-	-	-1.38%	13-Dec-21
Talaria Global Equity	6.32%	10.12%	9.70%	-	-	-	10.22%	30-May-22
Global Share – Emerging Markets								
Aikya Emerging Markets Opportunities	-1.40%	-	-	-	-	-	-0.56%	18-Nov-24
Fidelity Asia	-1.30%	8.43%	5.04%	7.00%	-	-	1.11%	13-Dec-21
Pendal Global Emerging Market Opportunities	3.83%	11.27%	10.59%	9.36%	8.47%	-	5.09%	15-May-18
Platinum Asia	1.59%	14.51%	7.47%	7.06%	6.31%	5.18%	8.20%	23-Mar-10
RQI Emerging Markets Value	5.17%	16.65%	16.79%	11.77%	11.12%	6.35%	5.81%	12-Apr-11
Skerryvore Global Emerging Markets All-Cap	2.71%	-	-	-	-	-	5.83%	18-Nov-24
Specialist Share								
Acadian Australian Equity Long Short	-3.63%	9.77%	12.53%	9.19%	16.76%	10.25%	7.36%	28-Feb-06
Acadian Global Equity Long Short	-1.82%	4.91%	24.01%	22.55%	24.82%	18.35%	9.82%	5-May-06
Bell Global Emerging Companies	-1.67%	3.75%	8.09%	7.11%	-	-	2.29%	13-Dec-21
CFS - Wellington Global Health and Biotechnology	-0.08%	-2.28%	7.49%	6.61%	6.28%	8.70%	7.04%	1-May-00
CFS - Wellington Global Small Companies	-4.33%	4.23%	11.99%	9.20%	12.82%	7.35%	7.83%	24-Apr-04
CFS - Wellington Global Technology and Communications	-12.93%	7.10%	28.29%	13.28%	17.35%	17.40%	7.71%	2-Nov-99
Janus Henderson Global Natural Resources	4.47%	-0.15%	2.41%	0.49%	12.47%	-	5.61%	15-May-18
L1 Capital Catalyst	-1.39%	-9.71%	-	-	-	-	1.92%	20-Nov-23
PM Capital Global Companies	7.86%	13.01%	18.69%	15.35%	23.37%	13.38%	9.27%	25-Feb-06
Perpetual Share-Plus Long-Short	-6.73%	-3.80%	-	-	-	-	3.73%	22-May-23
Platinum International	0.60%	1.48%	3.23%	7.73%	7.52%	4.58%	8.23%	18-Feb-03
Sage Capital Equity Plus	-2.11%	5.05%	9.02%	-	-	-	8.51%	21-Nov-22
Australian Property and Infrastructure Securities								
Dexus AREIT (Closed to new investors)	-1.99%	-2.98%	10.73%	1.25%	10.90%	3.94%	2.98%	17-May-16
First Sentier Property Securities	-7.32%	-6.52%	13.00%	3.50%	13.83%	7.73%	6.97%	8-Jul-94
Ironbark Property Securities	-7.27%	-8.21%	12.28%	1.82%	12.76%	7.43%	6.20%	6-Aug-02
Martin Currie Real Income	-0.54%	2.38%	5.78%	0.99%	8.68%	4.69%	5.17%	25-Oct-16
Pendal Property Investment	-7.34%	-6.06%	12.13%	2.93%	12.51%	7.80%	6.62%	24-Apr-02
Global Property and Infrastructure Securities								
ClearBridge RARE Infrastructure Value	4.98%	-	-	-	-	-	3.08%	18-Nov-24
Cohen And Steers Global Listed Infrastructure	4.76%	15.71%	8.97%	2.20%	8.34%	6.80%	9.16%	22-Dec-09
First Sentier Global Property Securities	-1.27%	-0.30%	3.23%	-6.65%	3.75%	2.20%	6.97%	12-May-04
Macquarie Global Listed Real Estate	-0.24%	2.25%	4.62%	-5.67%	4.48%	2.23%	5.29%	11-Apr-11
Magellan Infrastructure	4.14%	8.92%	5.21%	1.38%	6.06%	4.61%	5.02%	17-May-16
Quay Global Real Estate - Unhedged	1.05%	5.32%	10.81%	-	-	-	8.31%	21-Nov-22
Resolution Capital Global Property Securities	-0.21%	2.90%	5.17%	-5.08%	-	-	-4.42%	13-Dec-21
Geared								
Acadian Geared Core Australian Equity	-9.94%	-	-	-	-	-	-12.52%	18-Nov-24
Acadian Geared Global Equity	-10.75%	6.54%	30.62%	15.33%	29.27%	18.92%	9.76%	17-Apr-07
CFS Geared Share	-10.63%	1.39%	14.11%	5.08%	23.64%	14.87%	13.98%	18-Aug-97
First Sentier Geared Global Property Securities (Closed to new investors)	-4.19%	-11.67%	-2.56%	-23.83%	-0.89%	-4.09%	-4.84%	17-Apr-07

Options	3 months	1 year	2 years pa*	3 years pa*	5 years pa*	7 years pa*	Since inception*	Inception date
CFS Sustainability								
CFS Thrive+ Sustainable Growth	-3.04%	0.96%	8.16%	-	-	-	8.55%	21-Nov-22
CFS ETF Exposure Series								
CFS ETF Exposure Series: All-World ex-US Shares	4.40%	9.75%	12.74%	-	-	-	13.93%	21-Nov-22
CFS ETF Exposure Series: Physical Gold	16.75%	43.76%	27.33%	-	-	-	28.49%	21-Nov-22
CFS ETF Exposure Series: US Shares	-6.70%	10.49%	20.87%	-	-	-	19.63%	21-Nov-22
CFS ETF Exposure Series: US Treasury Bills	-0.06%	8.64%	-	-	-	-	7.04%	20-Nov-23

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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