

# Investment Option Summary

ANZ Smart Choice Super - Alphinity Sustainable Investments – Australian Shares

30 June 2020

## Description

The fund is suitable for investors seeking higher long-term returns within a socially responsible investment framework, through investing in the Australian equity market.

## Investment return objective

The fund aims to achieve returns (after costs but before fees and taxes) that exceed the S&P/ASX 300 Accumulation Index, over periods of three to five years or more.

## Investment strategy

The fund invests predominantly in a diversified portfolio of Australian shares, selected in accordance with a detailed sustainable Australian shares investment process. As a general guideline both positive and negative screens are applied in the stock selection process.

## Minimum time horizon

5 years

## Inception date

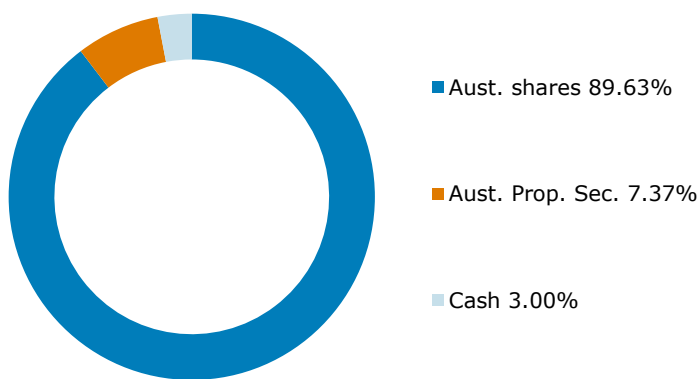
25 May 2015

Fund Code: MMF2180AU

## Fund performance

	1 mth %	3 mth %	6 mth %	1 yr pa %	3 yrs pa %	5 yrs pa %
Alphinity Sustainable Investments – Australian Shares	1.37	14.02	-7.10	-3.51	5.46	4.14

## Actual asset allocation



## Standard Risk Measure

The Standard Risk Measure (SRM) is based on industry guidance to allow investors to compare funds that are expected to deliver a similar number of negative annual returns over any 20 year period. The SRM for this fund is shown below:



\*ANZ Smart Choice Pension investment options are only offered through ANZ Smart Choice Super and Pension. Investment Earnings tax does not apply to Pension investment options and returns will differ from the equivalent Super investment options.

# Please note that this percentage will vary over time as the investment option becomes more conservative.

^ Listed Real Assets will include allocations to global listed property and listed infrastructure securities.