

Investment Option Summary

ANZ Smart Choice Super - BT Smaller Companies

30 September 2018

Description

This fund is suitable for investors who want the potential for long-term capital growth and tax-effective income, diversification across a broad range of smaller companies and industries and are prepared to accept higher variability of returns.

Investment return objective

The fund aims to provide a return (before fees, costs and taxes) that exceeds the S&P/ASX Small Ordinaries Accumulation Index over the medium to long term.

Investment strategy

The fund invests primarily in companies outside the top 100 listed on the Australian Securities Exchange. The fund may also invest in equivalent companies listed on the New Zealand Stock Exchange, hold cash and may use derivatives.

Minimum time horizon

5 years

Inception date

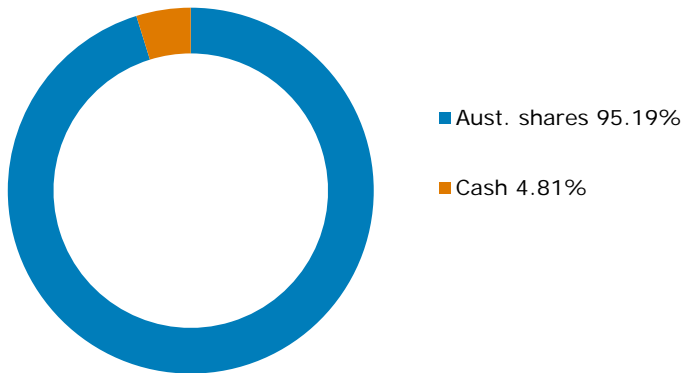
25 May 2015

Fund Code: MMF2143AU

Fund performance

	1 mth	3 mth	6 mth	1 yr	3 yrs	5 yrs
	%	%	%	pa %	pa %	pa %
BT Smaller Companies	-0.74	1.74	6.99	18.90	13.44	

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:



Returns quoted use the unit price which is calculated using the net asset values for the relevant month end. Please note that all returns are after the deduction of investment management fees. This document provides a summary only and it should not be considered a comprehensive statement of any matter or relied upon as such. This document contains returns for investment options offered through ANZ Smart Choice Super for employers and their employees and ANZ Smart Choice Super for OBE Management Services Pty Ltd and their employees. These products are issued by OnePath Custodians Pty Limited (ABN 12 008 508 496, AFSL 238346, RSE L0000637), a wholly owned subsidiary of ANZ. A copy of the relevant Product Disclosure Statement and Additional Information Guide (PDS) and ANZ FSG is available by visiting anz.com/smartchoice or by calling Customer Services. This information is of a general nature and has been prepared without taking account of your objectives, financial situation or needs. You should consider the appropriateness of the information, having regard to your objectives, financial situation or needs. You should read the PDS before deciding to acquire or hold the product. An investment in ANZ Smart Choice Super for employers and their employees or ANZ Smart Choice Super for OBE Management Services Pty Ltd and their employees is not guaranteed and can be volatile in the short term. Your investment is subject to a range of investment risks. These include possible delays in the repayment of withdrawals from your investment and loss of income and principal invested. Past performance is not indicative of future performance. The future value of investments may rise and fall with changes in the market.