

Investment Growth Bond

Fund profile
NC¹ – Australian Share

31 December 2023

Resolution Life

Investment strategy

To invest in a diversified portfolio of predominantly Australian listed company shares, in order to provide long term capital growth. This option may have a high level of short to medium-term volatility.

Investment objective

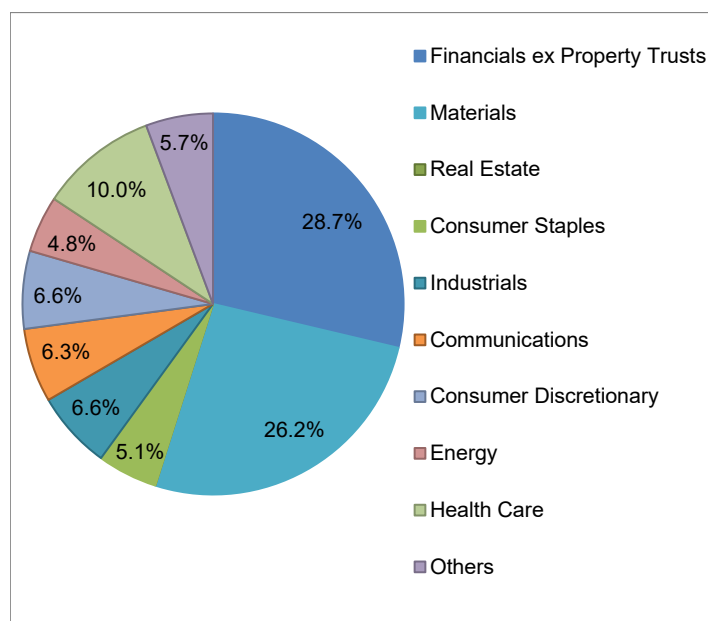
To outperform the S&P/ASX 300 Accumulation Index over a rolling seven-year period, before fees and taxes.

Fund features

Inception date	March 2013
Recommended investment period	7 years
Standard Risk Measure	Very high
Management fee²	1.30% p.a.
Investment option guarantee	No

Note: up to 4% of the allocation to Australian shares may be invested in international shares, with currency hedging at the discretion of the manager.

Asset allocation as at 31 December 2023



Performance as at 31 December 2023

	3 month (%)	6 month (%)	1 year (%)	2 years (%)	3 years (%)	5 years (%)	10 years (%)	Since inception (18 March 2013) (%)
Net return³	6.02%	5.06%	8.85%	3.95%	6.33%	7.37%	5.53%	5.83%

Awards

We're proud winners of the Association of Financial Advisers (AFA) Investment Bond Award 15 years running (2008 through to 2022)⁴.



We're also proud winners of the 2020, 2021, 2022 and 2023 Plan for Life Investment Bond Excellence Awards.

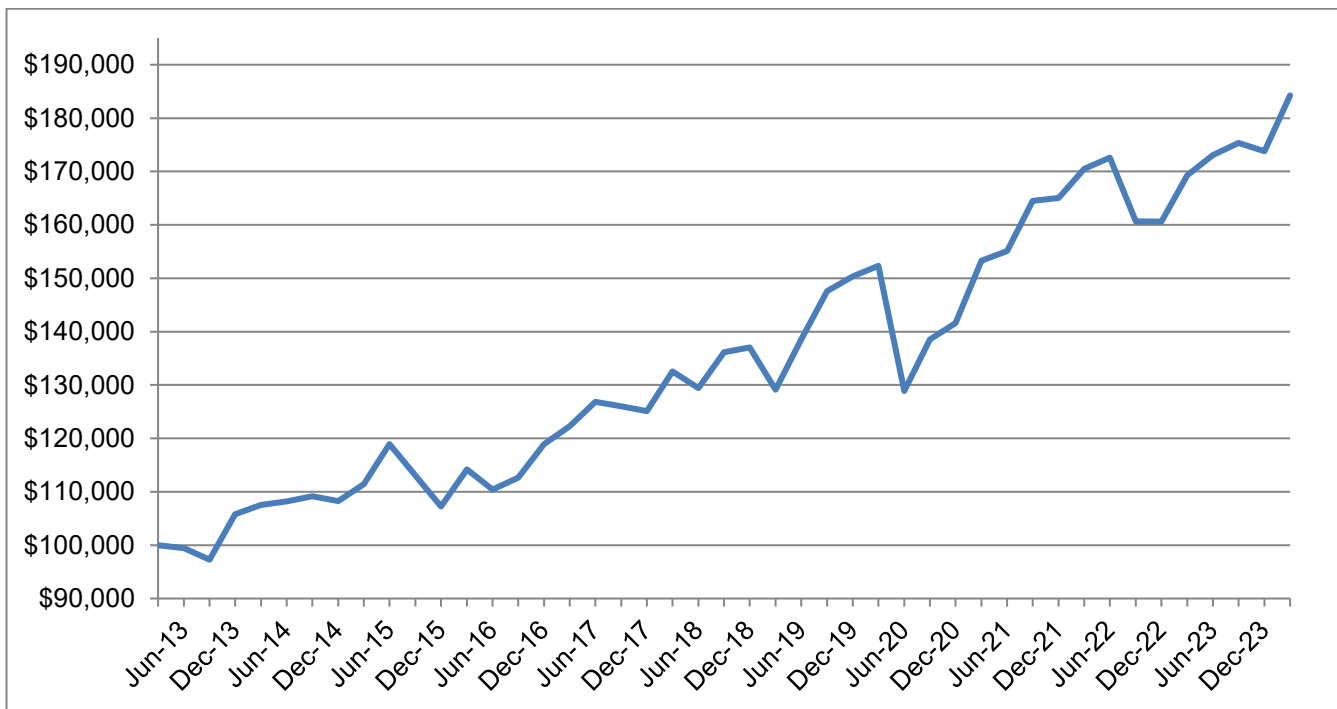


Past performance is not an indicator of future performance for this option or any other option available from us.

Notes

- 1 NC – Nil Commission.
- 2 There are no other product fees payable.
- 3 Returns greater than one year are annualised, all returns are net of management fees and taxes.
- 4 Plan For Life/AFA Investment Bond of the Year winner from 2008 through to 2022. Benchmarked on scores for financial, market and product strength factors.

Net investment performance as at 31 December 2023 (\$100,000 invested since inception)



Top 10 holdings as at 31 December 2023

BHP Group Ltd	10.28%	Rio Tinto Ltd	2.68%
Commonwealth Bank of Australia	6.83%	ANZ Group Holdings Ltd	2.65%
CSL Ltd	4.92%	Woolworths Group Ltd	2.47%
National Australia Bank Ltd	4.70%	Goodman Group	2.22%
Westpac Banking Corp	2.88%	Woodside Energy Group Ltd	2.19%

Investment minimums

Initial investment	\$1,000
Minimum additional contributions	\$200
Regular savings plan	Yes – via BPAY®
Minimum partial withdrawal	\$1,000
Minimum automatic regular withdrawal	\$500

For more information on this option, please contact our Customer Services Team on **1800 624 100**, between 9 am and 5 pm Monday to Friday (AEST/AEDT), excluding public holidays, or visit resolutionlife.com.au/aia/igb.

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