

Active High Growth Portfolio

Portfolio Profile

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Mercer CoreSeries Active offers six portfolios intended to meet the needs of a range of investors with medium to high risk profiles. Each portfolio is actively managed and diversified, and may invest in asset classes such as equities, property, infrastructure, cash and fixed interest.

What type of investor could this portfolio suit?

Mercer CoreSeries Active High Growth Portfolio could be suitable for an investor with a minimum seven year investment horizon with a high capacity and tolerance for risk, and who is looking to grow their wealth over the long-term and willing to ride out short-term market fluctuations.

Mercer CoreSeries Active High Growth Portfolio - Portfolio overview

Investment Objective	To provide relatively high total returns over the long term largely from capital growth by investing in a diversified mix of growth assets. The portfolio aims to earn a rate of return that exceeds the Consumer Price Index by at least 4.5% pa over a rolling 7 year period (net of fees and costs).
Investment Strategy	The portfolio invests primarily in growth asset classes such as equities, property and infrastructure. The portfolio's exposure will typically be 97% growth assets and 3% defensive assets.
Benchmark	CPI + 4.5%
Estimated number of negative returns over any 20 year period	5
Risk Level (SRM) ¹	High
Minimum suggested timeframe	7 years
APIR Code	WFS4680AU
Fees and costs	Refer to selected IDPS platform PDS
Minimum Investment	\$5,000

¹ Refer to selected IDPS platform PDS for details of the standard risk measure (SRM) assigned to the portfolio. The SRM is based on industry guidance and allows retail investors to compare managed portfolio options that are expected to deliver a similar number of negative annual returns over any 20 year period.

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Asset Class	SAA	Ranges	Underlying Fund	ARSN
Equity - Australian Listed	40%	25% - 55%	Fidelity Australian Opportunities MPS Fund	625 870 117
			Realindex Australian Shares MPS Fund	625 870 126
			Solaris Core Australian Equity MPS Fund	625 870 144
			Platypus Australian Equity MPS Fund	625 870 402
Equity - International Listed	47%	32% - 62%	Guardcap Global Equity MPS Fund	625 870 617
			T. Rowe Price Global Focused Equity MPS Fund	625 870 948
			Wellington Global Equity MPS Fund	625 871 007
			Skerryvore Global Emerging Markets All Cap Equities	642 641 405
			Blended Global Equities Hedged MPS Fund	625 870 591
Property - Australian Listed	3%	0% - 25%	Mercer Property Securities Index Fund	086 513 886
Property - International Listed	3%	0% - 25%	Principal Global Property MPS Fund	625 872 602
Infrastructure - Global Listed	4%	0% - 19%	Perpetual Diversified Income Fund	110 147 665
Fixed Income - Australian	0%	0% - 15%	Macquarie Australian Bond MPS Fund	625 873 805
			Pendal Australian Fixed Interest MPS Fund	625 873 912
			Janus Henderson Australian Fixed Interest MPS Fund	625 874 026
Fixed Income - International	0%	0% - 15%	PIMCO Global Fixed Interest MPS Fund	625 871 061
			Wellington Global Bond MPS Fund	625 871 338
			Western Asset Global Bond MPS Fund	625 871 436
			Perpetual Diversified Income Fund	110 147 665
Other - International (alternatives)	0%	0% - 15%	Mercer Multi-Strategy Alternatives Fund	625 870 091
Platform Cash	3%	2% - 18%	Advance Cash Multi-Blend Fund	094 113 050

For more information



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CoreSeries Portfolios are available through selected IDPS platforms. Please contact your adviser to find out what platforms this is available on.

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