



## 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 Moderate Portfolio could be suitable for an investor with a minimum four year investment horizon with a medium to high capacity and tolerance for risk, and who is looking to grow their wealth over the long-term, however, may be willing to accept a lower return for a lower risk investment.

### Mercer CoreSeries Active Moderate Portfolio - Portfolio overview

Investment Objective	To provide moderate total returns over the medium term from a combination of capital growth and income through a diversified mix of growth and defensive assets. The portfolio aims to earn a rate of return that exceeds the Consumer Price Index by at least 2.5% pa over a rolling 4 year period (net of fees and costs).
Investment Strategy	The portfolio invests in a diverse mix of assets with both growth asset classes such as equities, property and infrastructure of around 50%, and defensive asset classes such as cash and fixed interest securities of around 50%.
Benchmark	CPI + 2.5%
Estimated number of negative returns over any 20 year period	3.6
Risk Level (SRM) <sup>1</sup>	Medium
Minimum suggested timeframe	4 years
APIR Code	WFS9084AU
Fees and costs	Refer to selected IDPS platform PDS
Minimum Investment	\$5,000

<sup>1</sup> 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.

**Mercer CoreSeries Active Moderate Portfolio - Portfolio overview**

Asset Class	SAA	Ranges	Underlying Fund	ARSN
Equity - Australian Listed	23%	8% - 38%	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	18%	3% - 33%	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% - 24%	Mercer Property Securities Index Fund	086 513 886
Property - International Listed	3%	0% - 24%	Principal Global Property MPS Fund	625 872 602
Infrastructure - Global Listed	3%	0% - 18%	Atlas Infrastructure Fund	621 075 465
Fixed Income - Australian	14%	0% - 29%	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	19%	4% - 34%	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)	7%	0% - 22%	Mercer Multi-Strategy Alternatives Fund	625 870 091
Platform Cash	10%	2% - 30%	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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