

Investment Growth Bond

Fund profile
IGB – Australian Share

31 December 2024

Resolution Life

Investment objective and strategy

To provide returns above a published benchmark of Australian shares over the medium to long term before fees and taxes. The strategy aims to achieve its objective by investing in securities listed, or expected to be listed, on the Australian Securities Exchange.

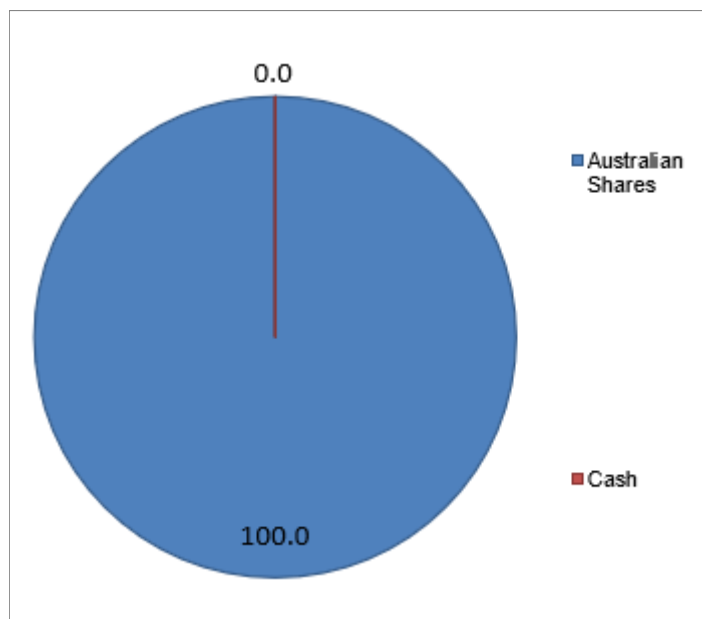
Fund features

Inception date	March 2013
Recommended investment period	7 years
Standard Risk Measure	Very high
Management fee ¹	1.31% 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.

Funds under management (\$m) 23

Asset allocation as at 31 December 2024



Performance as at 31 December 2024

	3 month (%)	6 month (%)	1 year (%)	2 years (%)	3 years (%)	5 years (%)	10 years (%)	Since inception (18 March 2013) (%)
Net return ²	0.62%	5.20%	7.82%	8.33%	5.23%	5.45%	5.95%	6.00%

Awards

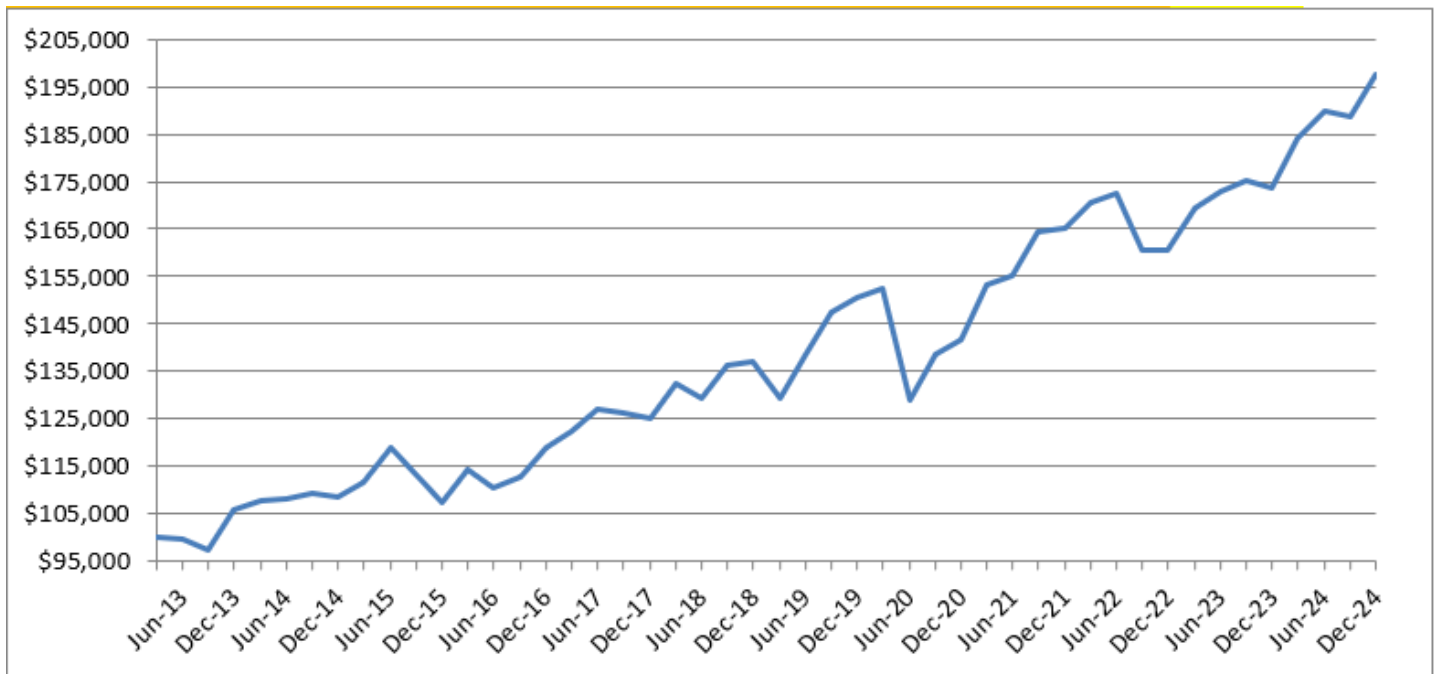
We're proud winners of the Association of Financial Advisers (AFA) Investment Bond Award 15 years running (2008 through to 2022)³. We're also proud winners of the 2020, 2021, 2022 and 2023 Plan For Life Investment Bond Excellence Awards.

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

Notes

- 1 There are no other product fees payable.
- 2 Returns greater than one year are annualised, all returns are net of management fees and taxes.
- 3 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 2024 (\$100,000 invested since inception)



Top 10 holdings as at 31 December 2024

Commonwealth Bank of Australia	10.47%	ANZ Group Holdings Ltd	3.49%
BHP Group Ltd	8.20%	Wesfarmers Ltd	3.33%
CSL Ltd	5.58%	Macquarie Group Ltd	3.23%
National Australia Bank Ltd	4.67%	Goodman Group	2.68%
Westpac Banking Corp	4.56%	Woodside Energy Group Ltd	1.95%

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 **133 731**, between 9 am and 5 pm Monday to Friday (AEST/AEDT), excluding public holidays, or visit resolutionlife.com.au/igb.

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For commentary on the financial markets, please refer to resolutionlife.com.au/insights for the latest economic update.

What you need to know

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