

# Investment Growth Bond

Fund profile  
NC<sup>1</sup> - Global Fixed Income

30 September 2024

**Resolution Life**

## Investment strategy

To invest in a diversified portfolio of Australian and global fixed income securities, in order to provide relatively stable returns. The portfolio aims to hedge currency risk.

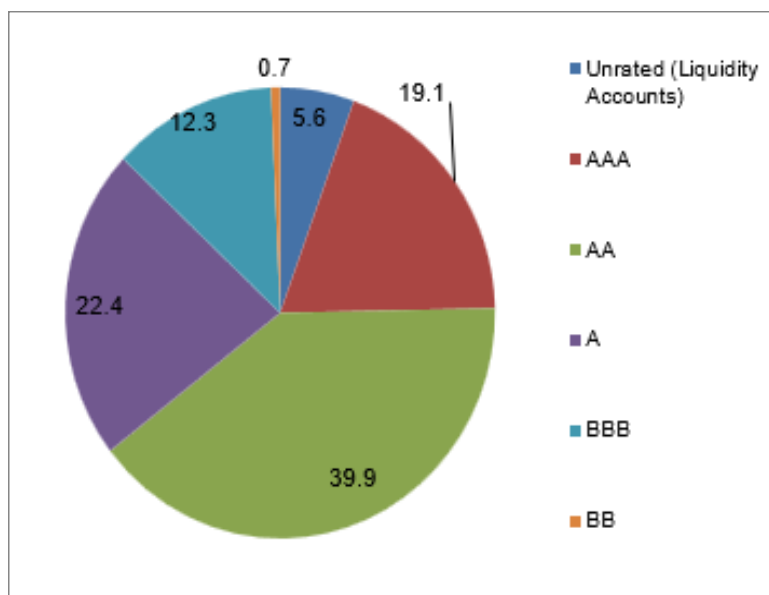
## Investment objective

To outperform the option's composite benchmark of 50% Bloomberg AusBond Composite 0+ Yr Index and 50% Bloomberg Barclays Global Aggregate Bond Index, hedged in AUD over a rolling three-year period, before fees and taxes.

## Fund features

Inception date	March 2013
Recommended investment period	3 years
Standard Risk Measure	Medium
Management fee <sup>2</sup>	1.10% p.a.
Investment option guarantee <sup>3</sup>	Yes

## Asset allocation as at 30 September 2024



Funds under management (\$m) 3.1

## Performance as at 30 September 2024

	3 month (%)	6 month (%)	1 year (%)	2 years (%)	3 years (%)	5 years (%)	10 years (%)	Since inception (18 March 2023) (%)
Net return <sup>4</sup>	2.32%	1.89%	4.95%	2.85%	-1.23%	-0.80%	0.85%	1.06%

## Awards

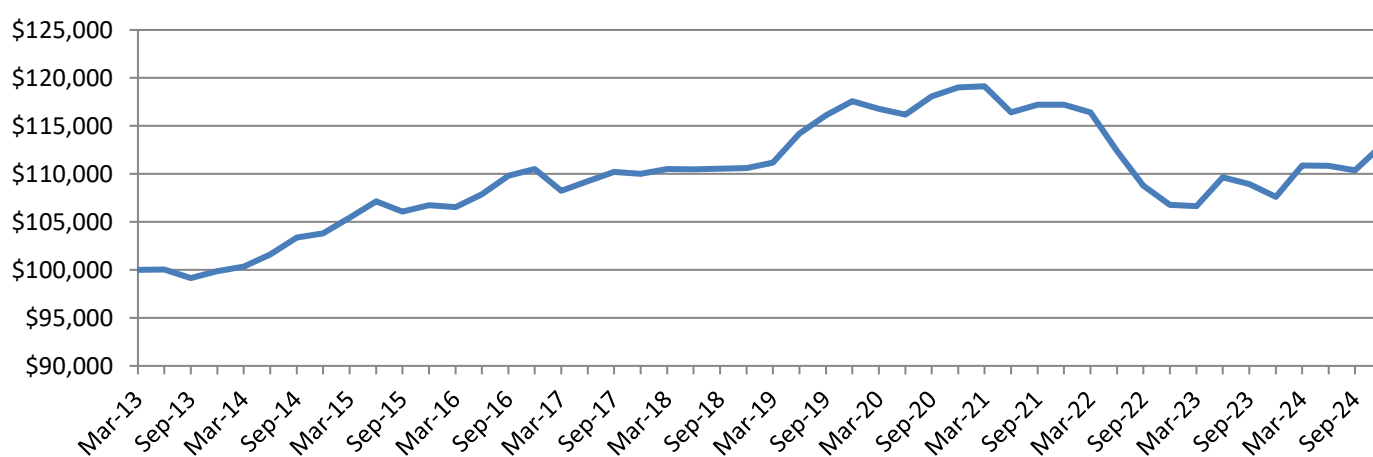
We're proud winners of the Association of Financial Advisers (AFA) Investment Bond Award 15 years running (2008 through to 2022)<sup>5</sup>. We're also proud winners of the 2020, 2021, 2022 and 2023 Plan For Life Investment Bond Excellence Awards.

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 The value of your investment is protected if held for at least two years. Refer to the PDS for more information.
- 4 Returns greater than one year are annualised, all returns are net of management fees and taxes.
- 5 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 30 September 2024 (\$100,000 invested since inception)



### Investment minimums

<b>Initial investment</b>	\$1,000
<b>Minimum additional contributions</b>	\$200
<b>Regular savings plan</b>	Yes – via BPAY®
<b>Minimum partial withdrawal</b>	\$1,000
<b>Minimum automatic regular withdrawal</b>	\$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](https://resolutionlife.com.au/igb).

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For commentary on the financial markets, please refer to [resolutionlife.com.au/insights](https://resolutionlife.com.au/insights) for the latest economic update.

### What you need to know

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