

# Investment Growth Bond

Fund profile  
NC<sup>1</sup> - Growth

30 September 2024

**Resolution Life**

## Investment strategy

To invest in a diversified portfolio of predominantly growth assets expected to generate a mix of long-term capital growth and income but which may be quite volatile in the short-to medium term.

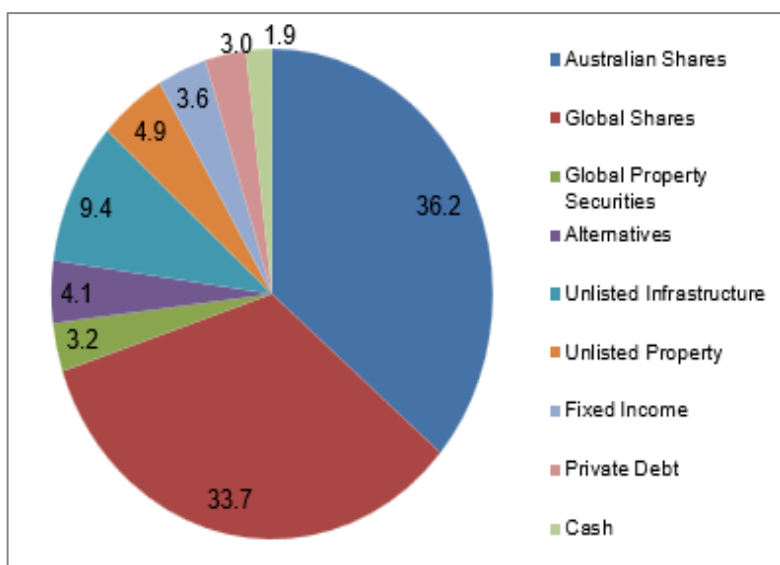
## Investment objective

This option aims to achieve a return of Consumer Price Index (CPI) plus 4% p.a. over a rolling seven-year period before fees and taxes.

### Fund features

Inception date	March 2013
Recommended investment period	7 years
Standard Risk Measure	High
Management fee <sup>4</sup>	1.41% p.a.
Investment option guarantee	No

## Asset allocation as at 30 September 2024<sup>2 and 3</sup>



Funds under management (\$m) 58.4

## 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) (%)
<b>Net return<sup>5</sup></b>	2.49%	2.28%	10.43%	9.52%	4.68%	5.17%	5.58%	5.90%

## Awards

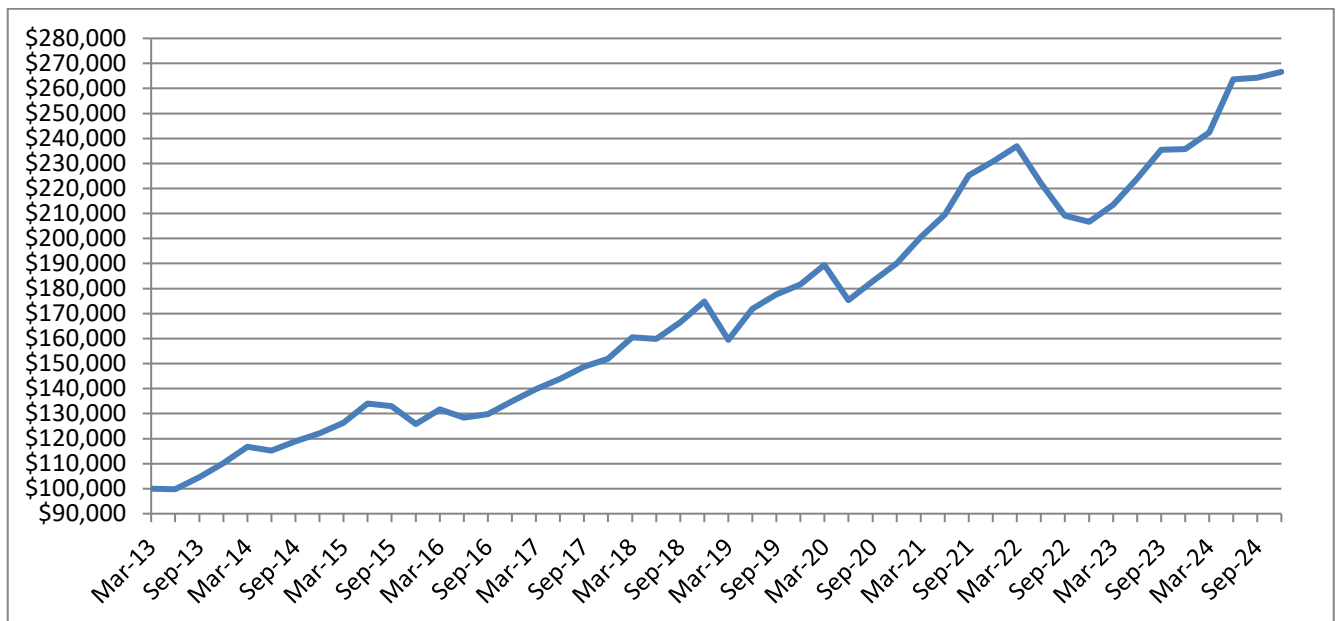
We're proud winners of the Association of Financial Advisers (AFA) Investment Bond Award 15 years running (2008 through to 2022)<sup>6</sup>. We're also proud winners of the 2020, 2021, 2022 and 2023 Plan For Life Investment Bond Excellence Awards

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 Up to 4% of the allocation to Australian Shares may be invested in International Shares, with currency hedging at the discretion of the manager.
- 3 Alternative investments in non-traditional asset classes that may be illiquid in nature. They may include but are not limited to private equity, alternative betas and hedge funds. Alternative investments offer the opportunity for enhanced returns and further portfolio diversification.
- 4 There are no other product fees payable.
- 5 Returns greater than one year are annualised, all returns are net of management fees and taxes.
- 6 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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