

Core Income Portfolio

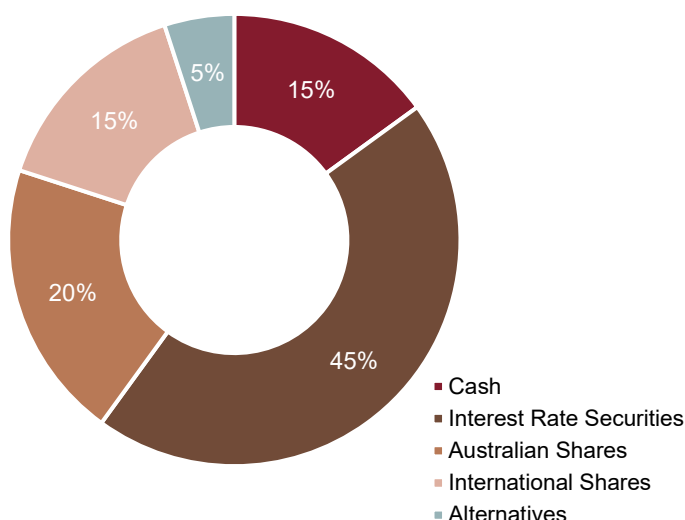
EVANS &
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The Evans and Partners Core Income Portfolio utilises Evans and Partners' asset allocation methodology and investment strategy expertise to provide income focused investors with exposure to a diversified portfolio of managed investments.

Investment Strategy

The Portfolio will target a 60% allocation to defensive income producing assets and 40% allocation to growth assets to achieve capital appreciation. The portfolio seeks to achieve its return objective and investment strategy via a blend of passive and actively managed underlying exposures.

Long-Term Target Asset Allocation



Key Benefits



Portfolio diversification

The portfolio provides a diverse exposure to a range of asset classes, investment managers and underlying securities.



Access to our best ideas

Managed by Evans and Partners Chief Investment Office, The Portfolio is constructed utilising Evans and Partners expertise and proprietary asset allocation and market research.



Core Exposure

The portfolio is designed to be a core component of an investors portfolio which can be complimented with other investments.

Portfolio Managers

Tim Rocks - Chief Investment Officer
Max Casey - Portfolio Strategist

Portfolio Details

Objective	To outperform the RBA Cash rate by a minimum of 1.5%, net of fees, over an investment timeframe of 5+ years.	Typical No. of Funds	12 – 20
Investment Universe	Managed Funds, SMAs, Direct Securities, ETFs, Cash, Foreign Currency	Contribution Plan	Available
Suitable Investors	An investor who is prepared to accept a moderate level of risk of capital loss to achieve returns above the benchmark over the medium term.	Suggested Timeframe	5 + years
Portfolio Fee	0% portfolio management fee. Underlying investment management fees of between 0.40% - 0.70% will apply	Maximum Security Holding	20%
		Benchmark	RBA cash rate + 1.5%
		Platforms	HUB24
		Minimum Investment	\$100,000
		Portfolio Code	EAP007

Disclaimer

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