

# Core Sustainable Portfolio

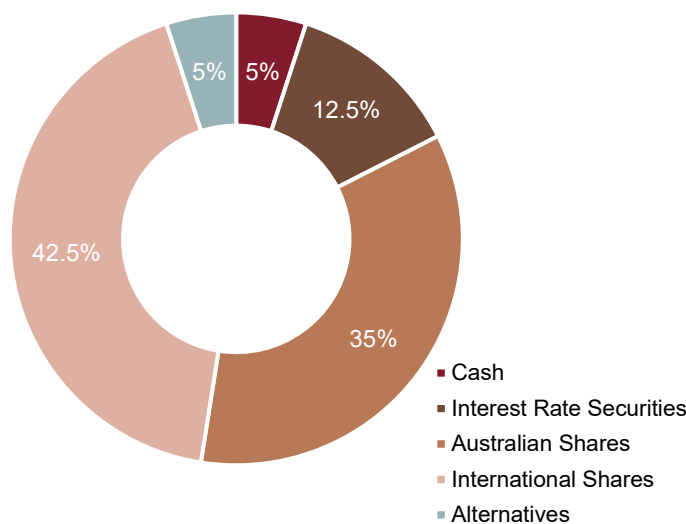
EVANS &  
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The Evans and Partners Core Sustainable Portfolio provides exposure to a portfolio of funds that seek to avoid investments that have a highly adverse effect on the environment or society. It also maintains a minimum 20% allocation to investments which are aligned to, and support, broad sustainability outcomes.

## Investment Strategy

The Portfolio will target a 20% allocation to defensive income producing assets and an 80% 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 exposures that align to the [E&P Core Sustainable Multi-Asset Investment Charter](#).

## 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.



### Sustainable investment mandate

The portfolio provides investors with access to a portfolio of high quality, sustainable investment solutions.

## Portfolio Managers

**Tim Rocks** - Chief Investment Officer  
**Max Casey** - Portfolio Strategist  
**Will Hart** - Director, ESG & Sustainable Investment

## Portfolio Details

<b>Objective</b>	To outperform the RBA Cash rate by a minimum of 3.0%, net of fees, over an investment timeframe of 5+ years.	<b>Typical No. of Funds</b>	14 – 22
		<b>Contribution Plan</b>	Available
<b>Investment Universe</b>	Managed Funds, SMAs, Direct Securities, ETFs, Cash, Foreign Currency	<b>Suggested Timeframe</b>	5 + years
		<b>Maximum Security Holding</b>	20%
<b>Suitable Investors</b>	An environmental, social and governance (ESG) conscious investor who is prepared to accept a higher level of risk of capital loss to achieve a superior return over the long-term.	<b>Benchmark</b>	RBA cash rate + 3%
		<b>Platforms</b>	HUB24
<b>Portfolio Fee</b>	0% portfolio management fee. Underlying investment management fees of between 0.40% - 0.70% will apply	<b>Minimum Investment</b>	\$50,000
		<b>Portfolio Code</b>	EAP009

## Disclaimer

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