Investment Option Summary

ANZ Smart Choice Super - Alphinity Sustainable Investments – Australian Shares

30 June 2026

Description

This investment option is suitable for investors seeking higher long-term returns within a socially responsible investment framework, through investing in the Australian equity market.

Investment return objective

This investment option aims to achieve returns (after costs but before fees and taxes) that exceed the S&P/ASX 300 Accumulation Index, over periods of three to five years or more.

Investment strategy

This investment option seeks to invest in sustainable companies that have the capacity to make a positive impact on society in areas of economic, environmental and social development.
Specifically, the investment option will target companies which contribute toward the advancement of the UN Sustainable Development Goals (SDG) agenda, which exceed our minimum ESG criteria and display appealing investment characteristics.

Minimum time horizon

5 years

Inception date

25 May 2015

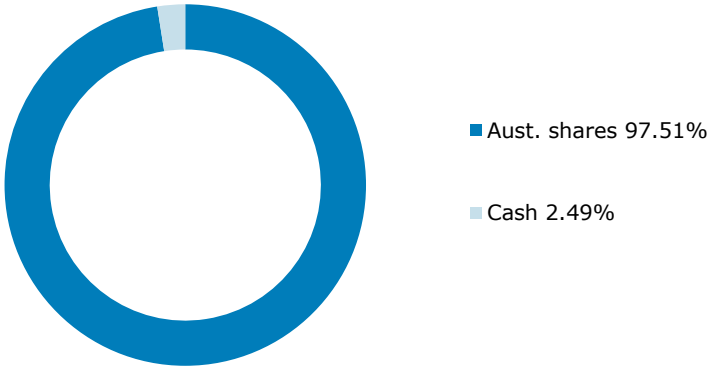
Fund Code: MMF2180AU

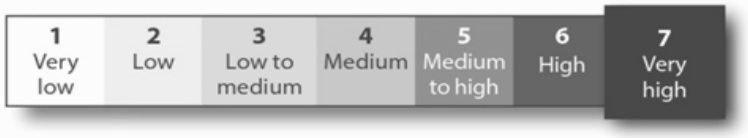
Fund performance

	1 mth %	3 mth %	6 mth %	1 yr pa %	3 yrs pa %	5 yrs pa %
Alphinity Sustainable Investments – Australian Shares	0.63	5.45	4.71	6.11	11.42	7.42

Past performance is not indicative of future performance.

Actual asset allocation



Standard Risk Measure

The Standard Risk Measure (SRM) is based on industry guidance to allow investors to compare funds that are expected to deliver a similar number of negative annual returns over any 20 year period. The SRM for this fund is shown below: