Investment Option Summary

ANZ Smart Choice Super - Perpetual Australian Shares

30 June 2026

Description

This investment option is designed for investors who are seeking long-term capital growth and regular income through investment predominantly in quality Australian industrial and resources shares, have a minimum investment timeframe of five years or longer and are comfortable with the risks associated with the investment option.

Investment return objective

This investment option aims to provide long-term capital growth and regular income through investment predominately in quality Australian industrial and resource shares. This investment option aims to outperform the S&P/ASX 300 Accumulation Index (before fees and taxes) over rolling three year periods.

Investment strategy

Perpetual researches companies of all sizes using consistent share selection criteria. Perpetual's priority is to select companies that represent the best investment quality and are appropriately priced. In determining investment quality, investments are carefully selected on the basis of four key investment criteria: conservative debt levels, sound management, quality business and recurring earnings. The investment option may have up to 20% exposure to investments in international shares. Derivatives may be used in managing this investment option.

Minimum time horizon

5 years

Inception date

25 May 2015

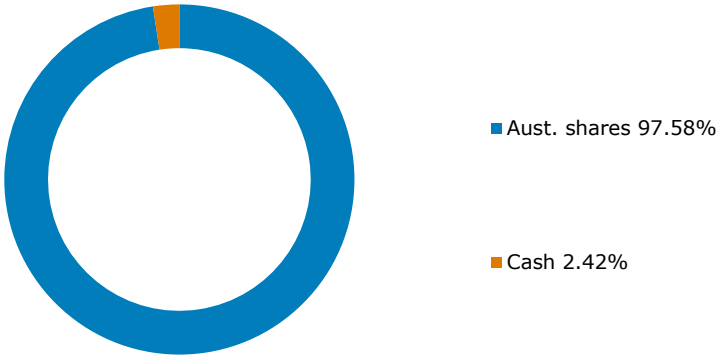
Fund Code: MMF2166AU

Fund performance

	1 mth %	3 mth %	6 mth %	1 yr pa %	3 yrs pa %	5 yrs pa %
Perpetual Australian Shares	1.24	5.15	2.35	4.17	5.43	5.43

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: