Investment Option Summary

ANZ Smart Choice Super - ClearBridge Global Infrastructure Value Hedged

30 June 2026

Description

This investment option is suitable for investors seeking regular and stable income and capital growth from a portfolio of global listed infrastructure securities, while hedging the fund's currency exposure back to Australian dollars. The fund is suitable for investors who are prepared to accept higher variability of returns.

Investment return objective

This investment option aims to provide investors with regular and stable income, comprised of dividends, distributions and interest plus capital growth from a portfolio of global infrastructure securities, while hedging the Fund's currency exposure back to Australian dollars. This investment option aims to outperform the benchmark, being an accumulation index comprised of the OECD G7 Inflation Index plus 5.5% per annum.

Investment strategy

ClearBridge intends to invest the assets of the fund in securities which offer positive absolute returns, rather than selecting securities because they are included in a particular industry standard index. The portfolio is comprised of 30–60 stocks drawn from an investment universe of over 200 stocks under research by our team. The assets of the companies in which we invest are predominantly located in developed markets, but we can invest up to 25% of the portfolio in infrastructure securities in developing markets.

Minimum time horizon

3–5 years

Inception date

25 May 2015

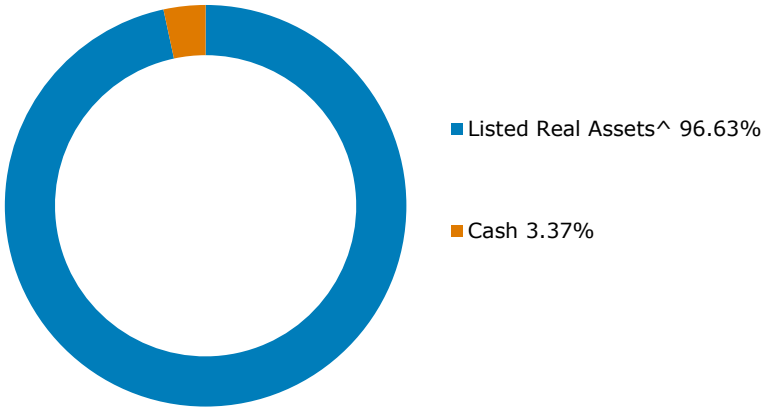
Fund Code: MMF2170AU

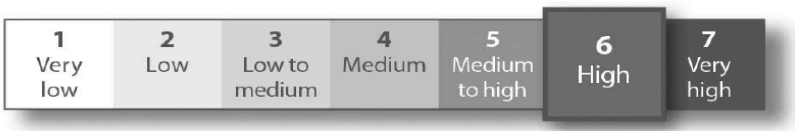
Fund performance

	1 mth %	3 mth %	6 mth %	1 yr pa %	3 yrs pa %	5 yrs pa %
ClearBridge Global Infrastructure Value	2.00	2.12	9.96	14.64	10.76	8.27

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: