

EVERGREEN ETHICAL INVESTMENT BALANCED PORTFOLIO

Name	Evergreen Ethical Investment Balanced Portfolio
Sector	Multi Asset
Platform	Wealth02
Investment structure	Managed Discretionary Account
Model manager	Evergreen Consultants
Launch date	7 July 2021
Pricing	Daily
Growth/Defensive split	60% Growth/40% Defensive
Risk level	6
Objective	To provide returns of Cash + 3.0% p.a. over 5 year rolling periods, with lower volatility and more moderate drawdowns than peers, in a sustainable way.
Description	The Evergreen Ethical Investment Balanced Portfolio provides investors with a portfolio that is invested primarily in growth assets, with a moderate level of exposure to defensive assets. Investors should expect returns primarily in the form of long-term capital growth, with defensive assets providing a level of capital stability. Using a 'top-down, bottom-up' approach and a proprietary Responsible Investment framework, Evergreen works to provide investors a well-diversified portfolio that will be resilient through various economic and market conditions and will deliver on model objectives.
Suggested length of investment	The minimum investment timeframe should be five years. Investors should understand that capital preservation is not guaranteed and that there is risk of price fluctuations, particularly over periods less than five years.
Management Costs	ICR 0.71%*

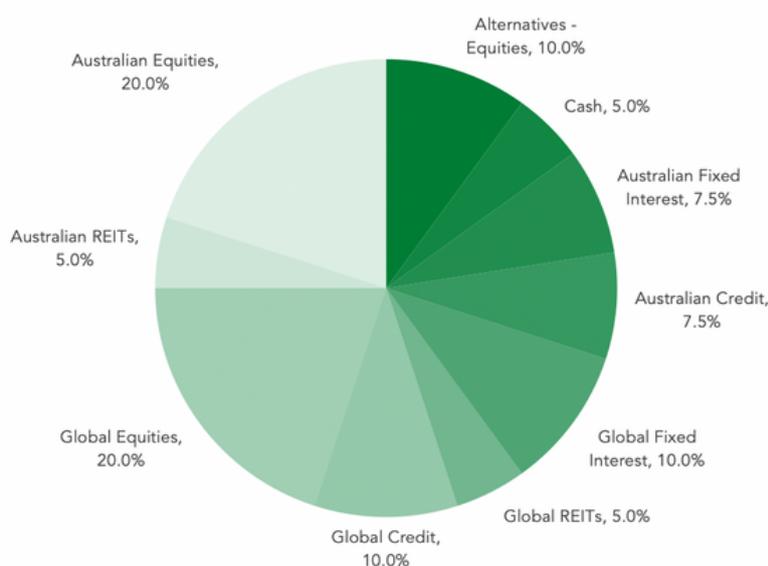
INVESTMENT APPROACH

Evergreen believes that asset allocation is the primary driver of long-term returns. The Model's Strategic Asset Allocation (SAA) has been designed to deliver on investment objectives over the investment time frame. Some tilting around the portfolio's SAA will also be undertaken, in line with the views of our Asset Allocation Committee. Evergreen conducts extensive analysis of potential investment options with respect to both their investment characteristics and their ESG attributes. This allows Evergreen to build a well-diversified sustainable balanced portfolio, capable of meeting both its investment and sustainability objectives.

ABOUT THE MODEL MANAGER

Founded in 2016, Evergreen is now one of Australia's leading investment consultants. Boasting one of the largest and most experienced investment teams in Australia, Evergreen is known for the quality of the in-depth, internally generated research it undertakes through all parts of the portfolio management process including asset allocation, manager selection, portfolio construction and on-going monitoring. Through this rigorous process, Evergreen strives to build robust portfolios which will meet all portfolio objectives with certainty.

STRATEGIC ASSET ALLOCATION



CONTACT US

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