EVERGREEN PREMIER CONSERVATIVE PORTFOLIO

Name	Evergreen Premier Conservative Portfolio
Sector	Multi Asset
Platform	HUB24
Investment structure	Separately Managed Account
Model manager	Evergreen Consultants
Launch date	10 October 2017
Pricing	Daily
Growth/Defensive split	30% Growth/70% Defensive
Risk level	3
Objective	To provide returns of Cash + 1.5% p.a. over 3 year rolling periods, with lower volatility and more moderate drawdowns than peers.
Description	The Evergreen Premier Conservative Model provides investors with a portfolio that is invested primarily in defensive assets, with some level of exposure to growth assets. Investors should expect returns primarily in the form of income, with some long-term capital growth. Using a 'top-down, bottom-up' approach, 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 three years. Investors should understand that capital preservation is not guaranteed and that there is risk of price fluctuations, particularly over periods less than three years.
Management Costs	ICR 0.70%*

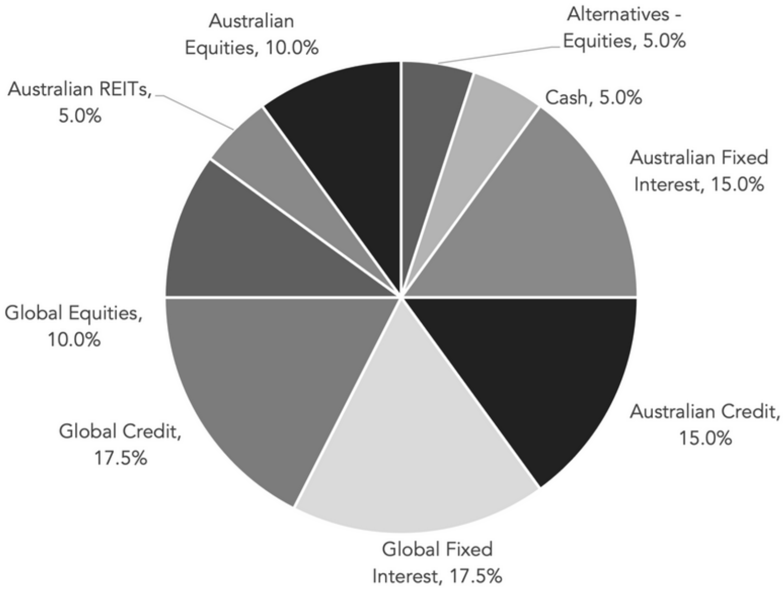
INVESTMENT APPROACH

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, and the Model will have a long-term average exposure of around 30% to growth assets and around 70% to defensive assets. 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 allowing Evergreen to construct a well-diversified defensive portfolio, capable of meeting both its investment 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



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