

Investment Option Summary

ANZ Smart Choice Super - MFS Global Equity

31 December 2023

Description

This investment option is designed for investors seeking the potential for capital appreciation over the longer term by investing in a diversified portfolio of global shares (unhedged).

Investment return objective

This investment option aims to seek capital appreciation over the longer term by investing in a diversified portfolio of global shares (unhedged) and aims to outperform its benchmark (the MSCI World Index (with net dividends reinvested) measured in AUD) over a full market cycle, before taking into account fees, taxes and expenses.

Investment strategy

Companies with sustainable above-average growth and returns, and whose prospects are not reflected in their valuation, will outperform over the long run. The value of compounding high returns on capital and above-average growth rates over long time periods is often underestimated by the market.

Through fundamental analysis, MFS seeks to identify enduring businesses, focusing on operational risks and the long-term potential for change. MFS considers whether the valuation reflects the long-term growth and returns of the company, and to what extent it adequately incorporates risk.

Minimum time horizon

5 years

Inception date

25 May 2015

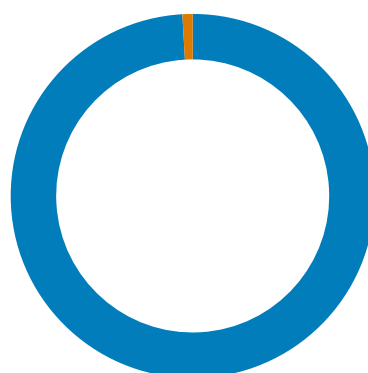
Fund Code: MMF2155AU

Fund performance

	1 mth %	3 mth %	6 mth %	1 yr pa %	3 yrs pa %	5 yrs pa %
MFS Global Equity	1.79	4.32	0.79	11.63	6.64	9.63

Past performance is not indicative of future performance.

Actual asset allocation



■ Int'l shares 99.09%

■ Cash 0.91%

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:

