

MORNINGSTAR CONSERVATIVE REAL RETURN CHANGES TO INVESTMENT GUIDELINES

29 September 2017

Perpetual WealthFocus Morningstar Conservative Real Return Investment Option

INVESTMENT GUIDELINES	OLD	NEW
Australian shares	0-30%	0-30%
International shares	0-30%	0-30%
Global property & infrastructure ¹		0-25%
Global property securities	0-20%	
Global infrastructure	0-10%	
Alternative Investments	0-25%	0-25%
Australian bonds	0-40%	0-50%
International bonds (hedged)	0-40%	0-50%
Global inflation-linked securities (hedged) ²	0-20%	
Cash	10-70%	0-70%

¹ 'Global property securities' and 'Global infrastructure' have been combined to form a consolidated asset class 'Global property & infrastructure'.

² 'Global inflation-linked securities (hedged)' have been incorporated into 'Australian bonds' and 'International bonds (hedged)'.

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MORE INFORMATION

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