

Lonsec Active (FirstChoice Managed Account Range)

The Lonsec Active (FirstChoice Managed Account Range) are a suite of multi-asset diversified portfolios that reflect Lonsec's best investment ideas, incorporating strategic asset allocation combined with an active approach to investment selection. The portfolios leverage Lonsec's extensive research capabilities investing in funds that are rated Recommended and higher. The six risk profiles provide a range of exposures designed to suit different investment objectives, time horizons and a choice of underlying investment vehicles to cater for different client goals.

| Risk profile and Investment strategy | Investment objective | Minimum timeframe | Benchmark |
|---|----------------------|-------------------|------------|
| Defensive The portfolio will have a long-term average exposure of around 20% to growth and alternative assets and around 80% to defensive assets, however the allocations will be actively managed within the allowable ranges depending on market conditions. | 0.8% p.a. above cash | 2 years | Cautious |
| Conservative The portfolio will have a long-term average exposure of around 40% to growth and alternative assets and around 60% to defensive assets, however the allocations will be actively managed within the allowable ranges depending on market conditions. | 1.6% p.a. above cash | 3 years | Moderate |
| Moderate The portfolio will have a long-term average exposure of around 50% to growth and alternative assets and around 50% to defensive assets, however the allocations will be actively managed within the allowable ranges depending on market conditions. | 2.0% p.a. above cash | 4 years | Balanced |
| Balanced Long-term average exposure of around 60% to growth and alternative assets and around 40% to defensive assets, however the allocations will be actively managed within the allowable ranges depending on market conditions. | 2.4% p.a. above cash | 5 years | Balanced |
| Growth Long-term average exposure of around 80% to growth and alternative assets and around 20% to defensive assets, however the allocations will be actively managed within the allowable ranges depending on market conditions. | 3.2% p.a. above cash | 6 years | Growth |
| High Growth Long-term average exposure of around 100% to growth and alternative assets and around 0% to defensive assets, however the allocations will be actively managed within the allowable ranges depending on market conditions. | 4.0% p.a. above cash | 7 years | Aggressive |

Investment universe

The portfolio invests across a diversified range of Australian equities, global equities, property and infrastructure, fixed interest assets and alternative assets.

Want to find out more?

Get in touch today to find out how we can help you start implementing managed portfolio solutions for your clients. Call us on **1300 826 395** or email **info@lonsec.com.au**

lonsec.com.au

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