



Fund Profile:

Nucleus Wealth Australian Leaders

Features

Number of stocks:	23-27
Benchmark:	ASX 20
Hedging:	None
Target Cash:	1.0%
Maximum Cash:	5.0%

Suggested Minimums¹:

- Initial Investment	\$10,000
- Additional deposits	\$1
- Time Invested	5 years

Fees:

- Investment fee	0.17%
- Indirect Cost Ratio ²	0.00%
- Performance Fee	None

Investor Suitability

Investors who have a high tolerance for risk and a long term investment timeframe.

Risk Levels

Very High. Negative return 6 years in every 20 years.

Available as a Separately Managed Account on the following platforms:

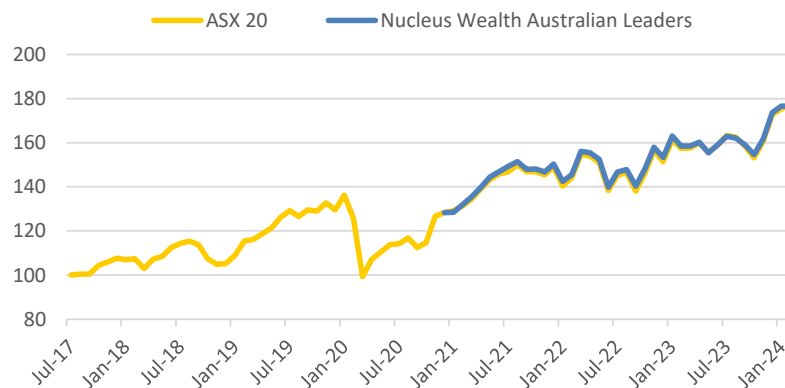
Praemium, Interactive Brokers

Investment Objective

This is a passive strategy designed to provide a (gross of fees) return in line with the S&P/ASX 20 Accumulation Index over rolling five year periods.

Return to 29 Feb 2024	1m	3m	1y	3y	Incept.
	%	%	%	% p.a.	% p.a. ⁴
Nucleus Wealth Australian Leaders					
- Pre fees	0.0	9.2	11.4	10.2	10.6
- Post investment fees	-0.1	9.1	11.2	10.0	10.4
Investment Objective:					
- ASX 20	0.9	10.2	12.5	10.5	10.7

Cumulative Returns



Investment Strategy

The model provides exposure to a portfolio of the 25 largest companies on the ASX. Securities are selected using a rules-based approach.

1. Portfolios with low balances may deviate performance due to share parcel sizes. 2. Based on strategic asset position. May be higher/lower based on tactical positions.

3. Administration fees vary on account type, amount invested and platform used. See PDS for details. 4. Inception is 30 Dec 2020.

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