

Activam Multi-Asset Series SMA Portfolios

Diversified risk profiles, across different styles, investment timeframes, & growth/defensive mix to cater to different investment requirements & objectives.

FUND NAME & CODE:

Activam -
Conservative & Income Portfolio
APIR code: WFS7753AU

Activam -
Moderate Portfolio
APIR code: WFS2925AU

Activam -
Balanced Portfolio
APIR code: WFS1365AU

Activam -
Index-Focused Balanced Portfolio
APIR code: WFS4218AU

Activam -
High Growth Portfolio
APIR code: WFS3587AU

ACTIVAM'S MANAGED PORTFOLIO OPTIONS

The Activam Group (Activam) Multi-Asset Series SMA Portfolios.

Activam - Conservative & Income Portfolio

Activam - Moderate Portfolio

Activam - Balanced Portfolio

Activam - Index-Focused Balanced Portfolio

Activam - High Growth Portfolio

These portfolios are actively managed multi-asset portfolios.

MANAGED ACCOUNTS SUPPORT VALUE CREATION

Managed Accounts can provide the following benefits to Advisers:

- Enhance efficiencies & scalability
- Enhancement of governance framework
- Strengthening of Client-Adviser relationships
- Access to actively & professionally managed portfolios
- Efficient implementation of active investment management
- Supports consistency of investment advice
- Leveraging Activam's strong portfolio performance track record

ABOUT ACTIVAM GROUP

Activam Group (Activam) is an investment management firm, offering Multi-Asset Portfolios, Managed Accounts, Investment Management and Investment Consulting Services.

Our commitment is to partner and grow with financial advisers, wealth practices, super funds, and wholesale investors. We offer support for multi-asset portfolios, managed account solutions and the development of investment frameworks, bringing to the table our extensive industry and investment expertise.

INVESTMENT PHILOSOPHY

We're active in managing your investments, through capturing opportunities, and managing risks. We explore new ideas whilst staying true to our proven investment approach.

- Dynamic Asset Allocation Strategy
- Evidence Over Speculation
- Diverse Source of Returns
- Cost Efficiency
- Market Efficiency vs. Human Emotions
- Capital Preservation

These principles underpin our approach – navigating unpredictable markets, managing risks, and tailoring strategies to your unique needs.

**Activam -
Where Growth,
Partnership, &
Evolution Converge**

Activam Multi-Asset Series SMA Portfolios

Dynamic Multi-Asset Portfolios - Committed to delivering exceptional opportunities and outcomes for investors seeking capital growth.

Portfolio Name	APIR Code	Series	Option	Growth / Defensive
Activam Conservative and Income Portfolio	WFS7753AU	Core	Defensive	Growth 20% Defensive 80%
Activam Moderate Portfolio	WFS2925AU	Core	Moderate	Growth 50% Defensive 50%
Activam Balanced Portfolio	WFS1365AU	Core	Balanced	Growth 70% Defensive 30%
Activam Index-Focused Balanced Portfolio	WFS4218AU	Index - Focus	Balanced	Growth 70% Defensive 30%
Activam High Growth Portfolio	WFS3587AU	Core	Aggressive	Growth 97% Defensive 3%

For information on fees and costs, see 'What are the fees and other costs?' section of the BT Managed Portfolios Part 2 - Investment Options Booklet Activam Issued 14 September 2023

For more information, please visit www.activam.com.au or email contact@activam.com.au

WHERE WE INVEST



**Australian Shares | International Shares | Property
Listed Infrastructure | Alternatives | Fixed Interest | Cash**

Disclaimer: This factsheet has been prepared by Activam Group Pty. Ltd. (ABN 94 668 434 517; AFS Rep. No. 001303834) and all information contained within this factsheet is current at the time of issue. This factsheet is prepared for general information purposes only, and does not constitute an offer, solicitation or recommendation for investment. It has been prepared without taking into consideration your objectives, financial situations or needs. Prior to making any investment decision, you need to consider whether this information is appropriate for your personal financial situation or needs, and investment objectives. The information contained in this factsheet has been compiled from sources considered to be reliable but not guaranteed. While we believe that this material is correct, no warranty of accuracy, reliability or completeness is given and, except for liability under statute which cannot be excluded, no liability for errors or omissions is accepted. As such, this factsheet is not intended to be a complete statement or summary. Nothing in this note is intended to constitute legal, tax, securities, or investment advice, nor an opinion regarding the appropriateness of any investment, nor a solicitation of any type. This factsheet is not to be reproduced, or used for any other purposes unless permission is granted by Activam Group.