

Zurich Investments Managed Growth Fund

The Zurich Investments Managed Growth Fund was first launched as a wholesale superannuation portfolio in 1979, making it one of the oldest managed funds in Australia that is still open for investment. Over this extensive period, the fund has continued to deliver competitive returns for investors.



Fund objectives

The fund aims to:

- provide investors with capital growth over the medium to long-term
- provide exposure across a range of asset classes
- achieve CPI+2.5% pa over rolling five year periods before fees and taxes.

Investment strategy

The Fund invests in a mix of Australian and international shares, property securities, fixed interest securities, alternative investments, infrastructure and cash. The fund is designed to reduce investment risk by diversifying across asset classes. Zurich Investments believes that successful investing comes from understanding the factors that drive and influence returns for different investments in different markets.

Key Features and Benefits

Features

True diversification across two levels:

- asset class
- strategic investment partners

Robust disciplined process

Specialist Portfolio Managers

Benefits

You benefit from sound diversification which improves the risk/return profile of the fund.

This process gives you a compelling risk/reward trade-off

Each asset class is managed by a team of highly experienced sector specialist portfolio managers

About the manager

The Fund is managed by an investment team of four highly experienced investment professionals at Zurich Investments. The team is supported by sector specialists from across the major asset classes. The strategic investment partners for each underlying asset class for the fund are as follows:

Asset class	Strategic investment partner
Australian shares	Antares Capital Partners Celeste Funds Management Nikko AM Limited Schroder Investment Management Australia Limited DWS International GmbH
International shares	American Century Investment Management, Inc Lazard Asset Management Pacific Co Realindex Investments Pty Limited Wells Capital Management, Inc Epoch Investment Partners, Inc
Australian property securities	Renaissance Property Securities Pty Ltd
Global property securities	Presima Inc.
Alternative Investments	Insight Investment Management (Global) Limited Robeco Hong Kong Limited
Infrastructure	Lazard Asset Management Pacific Co
Fixed interest and cash	Aberdeen Standard Investments Australia Limited
Absolute Return Bond	AllianceBernstein Investment Management Australia Limited

How the fund works

Zurich Investments believes that value can be added to the fund by carefully constructing a strategic benchmark allocation to achieve the long-term objectives. Active management of the tactical positions around this, using a combination of top-down and bottom-up inputs, can also provide the opportunity to enhance returns. Through access to extensive research capabilities, the fund aims to add value through superior stock selection in the underlying asset classes.

More information

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Investor profile

The fund is suitable for investors seeking:

- a medium to long-term investment
- capital growth and some income
- a diversified portfolio of Australian and international shares, property securities, fixed interest securities, alternative investments, infrastructure, absolute return bond and cash.

At a glance

Fund name	Zurich Investments Managed Growth Fund
APIR code	ZUR0059AU
ARSN	089 663 865
Responsible entity	Zurich Investment Management Limited
Investment style	Diversified
Target Return	The fund aims to achieve CPI+2.5% pa over rolling five year periods before fees and taxes.
Suggested investment timeframe	5+ years
Minimum investment amount	\$5,000 Master trusts & wrap accounts – subject to provider
Investment management fee	0.87% p.a.
Investment universe	A diversified portfolio of shares, property securities, fixed interest securities, alternative investments, infrastructure, absolute return bond and cash
Access to money	Available daily
Risk profile	High
Distribution frequency	Quarterly
Fund inception date	April 1997

Current investment performance, fund size and asset allocation, together with fund manager videos can be found at www.zurich.com.au/investments

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