

# Proactive Portfolios High Growth NW

As of 31/03/2026



## Returns versus multi sector benchmark

	1 Month	6 Months	1 Year	2 Years	Common Inception
Proactive Portfolios High Growth NW	-4.63	-0.91	10.17	7.63	9.61
Australia Fund Multisector Aggressive	-5.84	-3.12	8.64	7.17	10.27

## Objective

To produce a return before tax but after investment costs over rolling eight-year periods, which is equal to or better than than inflation plus 4.5% p.a.

The portfolio is expected to have an average of 90% in growth assets over the longer term.

## Asset allocation summary

	% Actual	% Long Term	% Min.	% Max.
Cash and Fixed Interest	12.02%	35.00%	20.00%	100.00%
Property & Infrastructure	5.61%	10.00%	0.00%	25.00%
Australian Equities	41.06%	35.00%	0.00%	55.00%
International Equities	41.31%	20.00%	0.00%	45.00%
Alternative Equities	0.00%	0.00%	0.00%	15.00%

## Commentary

March was a negative month as the Middle East conflict triggered a major energy shock and lifted stagflation risk. Global equities sold off, with the S&P 500 down 5.0%, the Nasdaq down 4.7%, Japan down 12.6% and the ASX 200 down 7.2%. Oil surged about 40%, while gold and silver fell around 12% to 15%. Bond markets repriced inflation risk, pushing US 10 year yields to 4.32% and Australia to 4.97%. The AUD weakened to US\$0.69. For SMA portfolios we emphasise diversification, quality and resilient income while managing duration risk.

## Risk metrics

	Standard Deviation	Sharpe Ratio		Weighting
1 Month	0.49	-0.41	Vanguard MSCI Intl ETF	13.26%
6 Months	0.35	-0.05	RBA Cash Rate Target	11.88%
1 Year	0.39	0.05	Vanguard MSCI Intl (Hdg) ETF	11.36%
2 Years	7.36	0.58	Vaneck Msci International Quality Etf	7.06%
Common Inception	7.71	0.79	Magellan Infrastructure Ccy Hdg ETF	5.68%

## Top holdings

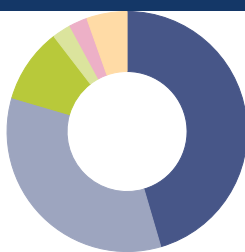
iShares MSCI Emerging Markets ETF (AU)	4.35%
BHP Group Ltd	4.34%
Vanguard Australian Government Bond ETF	3.85%
VanEck Australian Property ETF	3.27%
National Australia Bank Ltd	2.85%

## Cumulative investment return



■ Proactive Portfolios High Growth NW

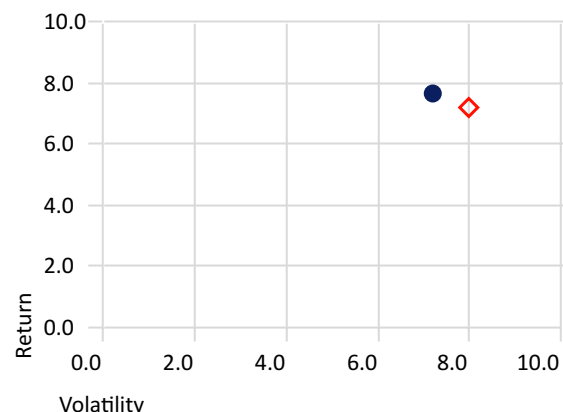
## Regional exposure (equities)



	%
•Australasia	45.5
•North America	34.1
•Europe dev	10.0
•United Kingdom	2.5
•Asia dev	2.5
•Other	5.4

## Return vs. volatility of return

Time Period: 1/04/2024 to 31/03/2026



● Proactive Portfolios High Growth NW ◆ Australia Fund Multisector Aggressive

## Contributors for the month

	Weights	Return	Contribution
Woodside Energy Group Ltd	1.12	27.20	0.36
Ampol Ltd	0.78	21.88	0.20
Telix Pharmaceuticals Ltd Ordinary Shares	0.36	36.60	0.16
Telstra Group Ltd	1.65	2.90	0.06
Woolworths Group Ltd	1.51	2.41	0.04

## Detractors for the month

	Weights	Return	Contribution
Vanguard MSCI Intl (Hdg) ETF	11.51	-5.79	-0.80
BHP Group Ltd	4.61	-12.11	-0.67
National Australia Bank Ltd	2.83	-15.46	-0.52
iShares MSCI Emerging Markets ETF (AU)	4.52	-9.57	-0.52
VanEck Australian Property ETF	3.50	-10.61	-0.44

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