

# Proactive Portfolios High Growth

As of 31/03/2026



## Returns versus multi sector benchmark

	1 Month	6 Months	1 Year	3 Years	5 Years	Common Inception
Proactive Portfolios High Growth	-4.45	-0.27	11.34	10.37	7.43	8.22
Australia Fund Multisector Aggressive	-5.84	-3.12	8.64	10.57	7.85	8.25

## 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	11.33%	10.00%	0.00%	30.00%
Property & Infrastructure	5.98%	10.00%	0.00%	25.00%
Australian Equities	39.82%	45.00%	0.00%	75.00%
International Equities	42.87%	35.00%	0.00%	55.00%
Alternative Equities	0.00%	0.00%	0.00%	20.00%

## 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 and performance metrics

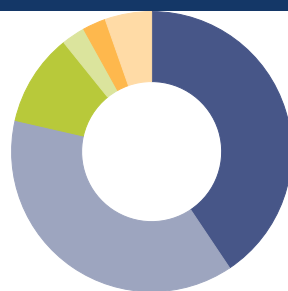
	Standard Deviation	Sharpe Ratio	Weighting
1 Month	0.50	-0.38	Vanguard MSCI Intl ETF 22.68%
6 Months	0.36	-0.04	Vanguard MSCI Intl (Hdg) ETF 15.05%
1 Year	0.40	0.06	RBA Cash Rate Target 7.43%
3 Years	0.38	0.05	Magellan Infrastructure Ccy Hdg ETF 5.98%
5 Years	0.44	0.03	BHP Group Ltd 4.73%
Inception	0.48	0.04	iShares MSCI Emerging Markets ETF (AU) 4.05%
			Vanguard Australian Government Bond ETF 3.87%
			Global X US Treasury Bond (Ccy Hdg) ETF 3.05%
			National Australia Bank Ltd 2.69%
			ANZ Group Holdings Ltd 2.11%

## Top holdings

## Cumulative investment return



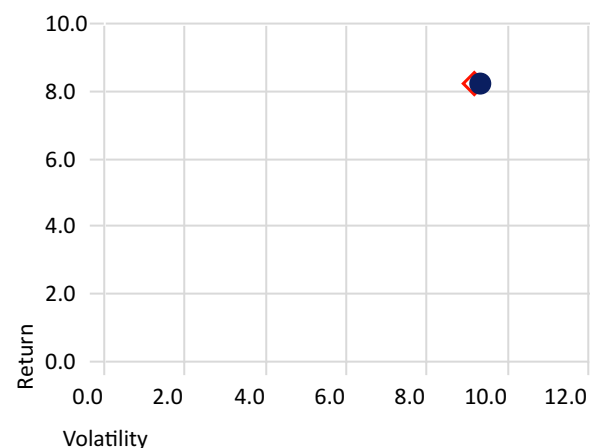
## Regional exposure (equities)



	%
•Australasia	40.6
•North America	38.0
•Europe dev	10.6
•United Kingdom	2.7
•Japan	2.7
•Other	5.4

## Return vs. volatility of return

Time Period: 1/06/2010 to 31/03/2026



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◆ Australia Fund Multisector Aggressive

## Contributors for the month

	Weights	Return	Contribution
Woodside Energy Group Ltd	1.22	27.20	0.38
Ampol Ltd	0.73	21.88	0.18
Telix Pharmaceuticals Ltd Ordinary Shares	0.41	36.60	0.17
Telstra Group Ltd	1.69	2.90	0.06
Woolworths Group Ltd	1.71	2.41	0.05

## Detractors for the month

	Weights	Return	Contribution
Vanguard MSCI Intl (Hdg) ETF	15.22	-5.79	-1.02
BHP Group Ltd	5.03	-12.11	-0.70
Vanguard MSCI Intl ETF	22.36	-2.50	-0.64
National Australia Bank Ltd	2.96	-15.46	-0.53
iShares MSCI Emerging Markets ETF (AU)	4.17	-9.57	-0.46

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Source: Morningstar Direct