

## HF Cautious 30

30 November 2024

### Portfolio summary

A portfolio of actively and passively managed assets designed to achieve stable returns over the short- to medium-term.

**Asset class** Mixed Asset

**Style** Passive

**FE peer group<sup>1</sup>** Mixed Asset - Moderate

**Inception date** 18/09/1995

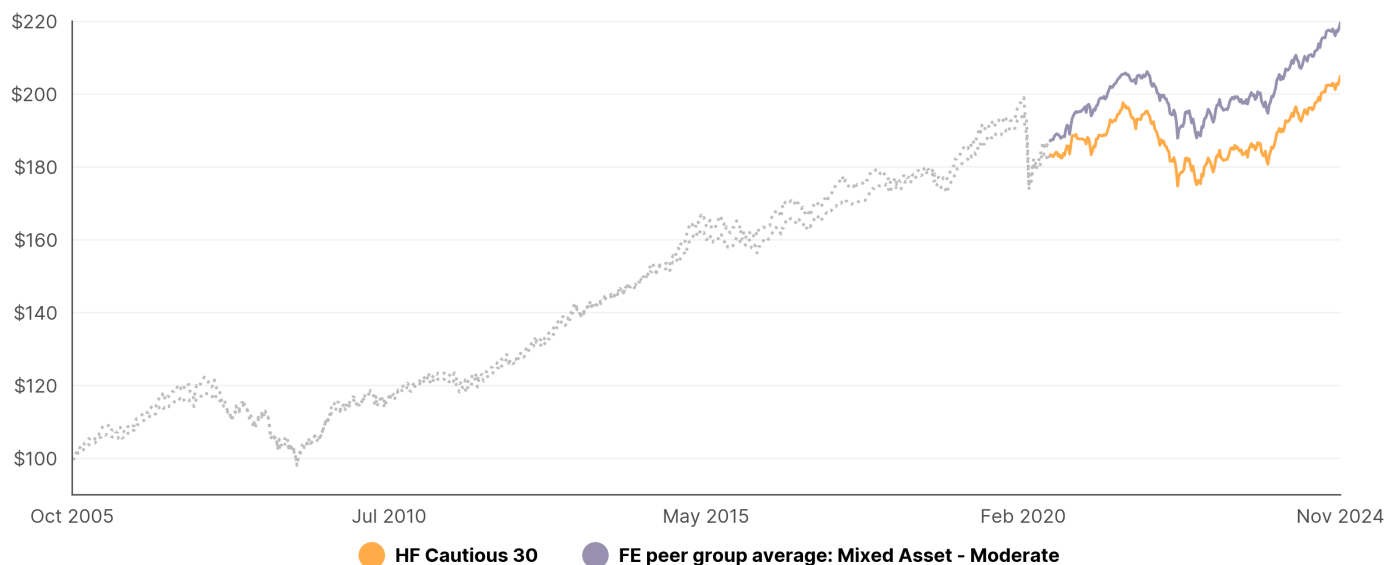
**Management costs** 1.27% p.a.

### Performance<sup>2</sup>

	1 month (%)	3 months (%)	6 months (%)	1 year (% p.a.)	3 years (% p.a.)	5 years (% p.a.) <sup>2</sup>	7 years (% p.a.) <sup>2</sup>	Since inception (% p.a.) <sup>2</sup>
<b>HF Cautious 30</b>	1.58	2.04	5.36	10.23	2.07	1.13	1.93	5.08
<b>FE peer group average</b>	1.49	1.82	5.04	9.75	2.46	2.84	3.32	4.59

### Growth of \$100 since inception<sup>2,3</sup>

14/10/2005 - 29/11/2024 Powered by data from FE fundinfo



## Important Information

1. The FE Peer Group is the group of all funds within the relevant FE fundinfo category that each product is compared against.
2. Investors invested prior to 26 June 2020 held interests in the predecessor product known as 'ClearView Separately Managed Account (SMA) Models'. For the purposes of providing an estimate of the combined investment performance Since Inception for these investors, we used a blend of the investment performance which is referable to the predecessor product 'ClearView SMA Model' from inception to 26 June 2020 and the investment performance which is referable to the Human Financial Managed Portfolios from 26 June 2020. Investors should note that this is for general information purposes only; is only relevant to investors invested prior to 26 June 2020; and does not reflect the actual investment returns of such investors.
3. Asset class breakdown and geographic allocation may not add to 100% due to rounding and/or investment strategy.



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The target market for each product is described in the relevant target market determination (TMD) available at [humanfinancial.com.au/documents](http://humanfinancial.com.au/documents).