A photograph of several wind turbines in a field at sunset. The sky is a mix of orange, yellow, and dark brown, with the sun low on the horizon. The turbines are silhouetted against the bright sky. The foreground shows a field of crops, possibly corn, in the lower right corner.

# Better World Portfolios

*Highly Diversified, Ethically Managed  
Accounts invested in direct equities, ETFs  
and managed funds.*

AVAILABLE ON MASON STEVENS

## Reliable, sophisticated managed Account solutions for financial planners and their clients.

InvestSense constructs and manages portfolios using quality holdings, in depth risk evaluation and optimal levels of diversification. The InvestSense Portfolios provide active, yet cost effective, portfolio management that offers investors total portfolio transparency and accessibility.

The InvestSense Diversified Managed Account Portfolios are our flagship portfolios incorporating

direct shares, active and passive Funds and ETFs to successfully target CPI+ objectives. The Better World Portfolios are a suite of ethically aware, diversified managed account portfolios that combine ethically screened direct Australian equities with a selection of leading investment managers and exchange-traded funds that focus on Ethical, Sustainability and Impact investing.

There is a portfolio to suit most investor risk profiles.

### ‘Three pillars’ of the InvestSense approach



#### Proactive

We review the markets regularly and take a forward-looking view of where they are heading. We regularly interview managers, keep up to date with market information and assess risks and opportunities. This can sometimes mean we make decisions that are at odds with the rest of the market.



#### Valuation driven

We believe the price you pay for an investment – its value – really matters. Our valuation approach ensures that our investors are suitably rewarded for the risks they are taking.



#### Transparent

You are trusting us to invest your clients' money, so we want you to understand how we do it. Details about your portfolios can be easily obtained on our portal, at any time.

# Mason Stevens - Better World options

The Better World Portfolios provide a unique opportunity for investors to access a diversified Managed Account portfolio within an ethically responsible framework.

Better World Portfolios	Portfolio 3	Portfolio 5
Benchmark	CPI+ 3%	CPI+ 5%
Suggested timeframe	7+ years	10+ years
Risk band	Medium-High	Very High
Growth/Defensive Asset allocation	70/30	100/0
Estimated Investment Fees % (pa)*	0.76%	0.84%

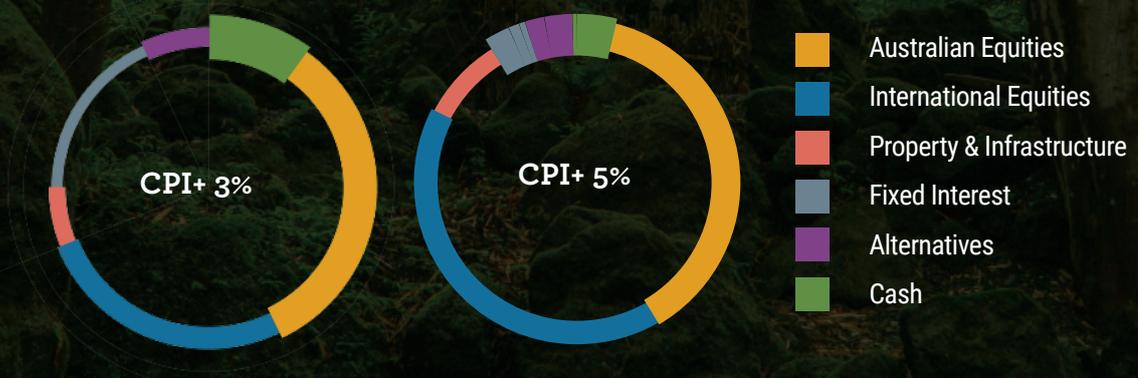
\*Estimated Investment Fee includes Investment Management Expenses. Excludes Performance related, transactional and operational expenses. Please refer to the PDS.

**The InvestSense Better World Portfolios provide investors with the ability to invest in a diversified portfolio that aligns with their ethical values.**

The InvestSense Better World Portfolios are a suite of ethically aware diversified portfolios that combine ethically screened direct Australian equities with a selection of leading Fund Managers and Exchange Traded Funds that focus on Ethical, Sustainability and Impact investing.

These portfolios include Fund managers who:

- invest in securities that provide a positive contribution to society or the environment
- are targeting investments that relate to the UN Sustainable Development Goals
- are signatories to the UN Principles of Responsible Investing (PRI) or members of the Responsible Investment Association of Australasia (RIAA).



For more information about the  
**InvestSense Portfolios**,  
please call our sales team.



**Paul Carrington**  
Director, Head of Distribution  
pcarrington@investsense.com.au  
M. 0421 582 282  
investsense.com.au



**Stephen Poole**  
Distribution Executive  
spool@investsense.com.au  
M. 0411 511 889  
investsense.com.au



**John Nicoll**  
Distribution Executive  
jnicol@investsense.com.au  
M. 0448 404 411  
investsense.com.au

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