

# MORNINGSTAR BALANCED REAL RETURN CHANGES TO INVESTMENT GUIDELINES

29 September 2017

## Perpetual WealthFocus Morningstar Balanced Real Return Investment Option

INVESTMENT GUIDELINES	OLD	NEW
Australian shares	0-45%	0-45%
International shares	0-45%	0-45%
Global property & infrastructure <sup>1</sup>		<b>0-35%</b>
Global property securities	0-30%	
Global infrastructure	0-15%	
Alternative Investments	0-25%	0-25%
Australian bonds	0-30%	<b>0-40%</b>
International bonds (hedged)	0-30%	<b>0-40%</b>
Global inflation-linked securities (hedged) <sup>2</sup>	0-20%	
Cash	0-55%	0-55%

<sup>1</sup> 'Global property securities' and 'Global infrastructure' have been combined to form a consolidated asset class 'Global property & infrastructure'.

<sup>2</sup> 'Global inflation-linked securities (hedged)' have been incorporated into 'Australian bonds' and 'International bonds (hedged)'.

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### MORE INFORMATION

Adviser Services 1800 062 725

Investor Services 1800 022 033

Email [investments@perpetual.com.au](mailto:investments@perpetual.com.au)

[www.perpetual.com.au](http://www.perpetual.com.au)