



Stockspot Topaz Income portfolio

(High growth)

Investment objective

The Stockspot Topaz Income portfolio seeks to generate higher annual income including franking credits while diversifying across countries, assets and sectors to achieve attractive long term risk-adjusted returns. It invests in a broad range of assets with a tilt towards income generation. The broad diversification and the inclusion of some non-income generating assets such as gold makes the portfolio appropriate as a core investment holding.

Benefits



Get income without compromising growth

Maximise your earnings potential with a balanced approach that doesn't sacrifice long-term growth.



Automated rebalancing

Optimise your investing through automatic rebalancing so you don't need to worry about buying and selling your investments.



All admin and tax reporting done for you

Invest with ease and peace of mind. We handle the paperwork and tax complexities, so you can focus on what matters most.



Stockspot's best ETF selections

Our investment team is constantly researching the ETF universe to determine the best low-cost ETFs available.

Key information

Income return grossed up (1 year)	Suggested investment horizon	ETF fees	Stockspot fees
5.06%	7 years+	0.35% p.a.	Based on investment balance. See our pricing page .

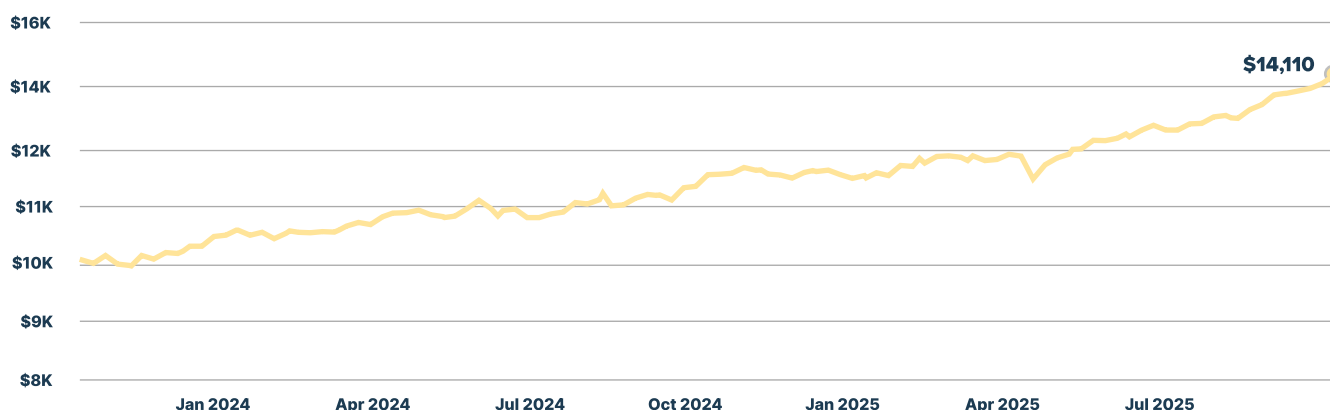
Historical performance

Period	1 Year	Inception (total)
Return	18.8%	41.1%

Calendar year performance

Period	2024
Return	11.0%

Value of \$10,000 since inception





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Portfolio information

Asset class	Investment	Allocation
Growth		
Australian shares	Vanguard Australian Shares High Yield ETF	13.0%
Australian shares	Vanguard MSCI Australian Small Companies ETF	13.0%
Australian shares	SPDR S&P/ASX 200 Resources ETF	13.0%
Global shares	SPDR S&P Global Dividend ETF	13.0%
Emerging market shares	iShares Emerging Markets ETF	13.0%
Property	VanEck FTSE International Property Hedged ETF	13.0%
Defensive		
Bonds	Vanguard Australian Corporate FixedInterest Index ETF	7.2%
Gold	Global X Physical Gold	14.8%

Sector	
Communication services	4.1%
Energy	8.6%
Industrials	6.6%
Technology	5.3%
Basic materials	22.8%
Consumer cyclical	7.2%
Financial services	16.8%
Real estate	21.1%
Consumer defensive	2.9%
Health care	1.8%
Utilities	2.9%

Country	
Americas	20.3%
North America	19.0%
Latin America	1.3%
Greater Europe	8.6%
United Kingdom	2.0%
Europe (developed)	4.5%
Europe (emerging)	0.3%
Africa/Middle East	1.9%
Greater Asia	71.0%
Japan	4.3%
Australasia	50.2%
Asia (developed)	7.5%
Asia (emerging)	9.0%



Get in touch and speak with a Stockspot adviser today

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