

Stockspot Amethyst Portfolio (Conservative)

Investment objective

The Amethyst portfolio aims to reduce the impact of share market movements. It includes more defensive investments like bonds and gold to provide a regular income and cushion against market dips. There are also some Australian and global shares which gives the portfolio growth potential while diversifying across countries, assets and sectors to achieve attractive long term risk-adjusted returns.

Benefits



Get income without compromising growth

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



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.



Automated rebalancing

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



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
1.98%	3 years+	0.24% p.a.	Based on investment balance. See our pricing page .

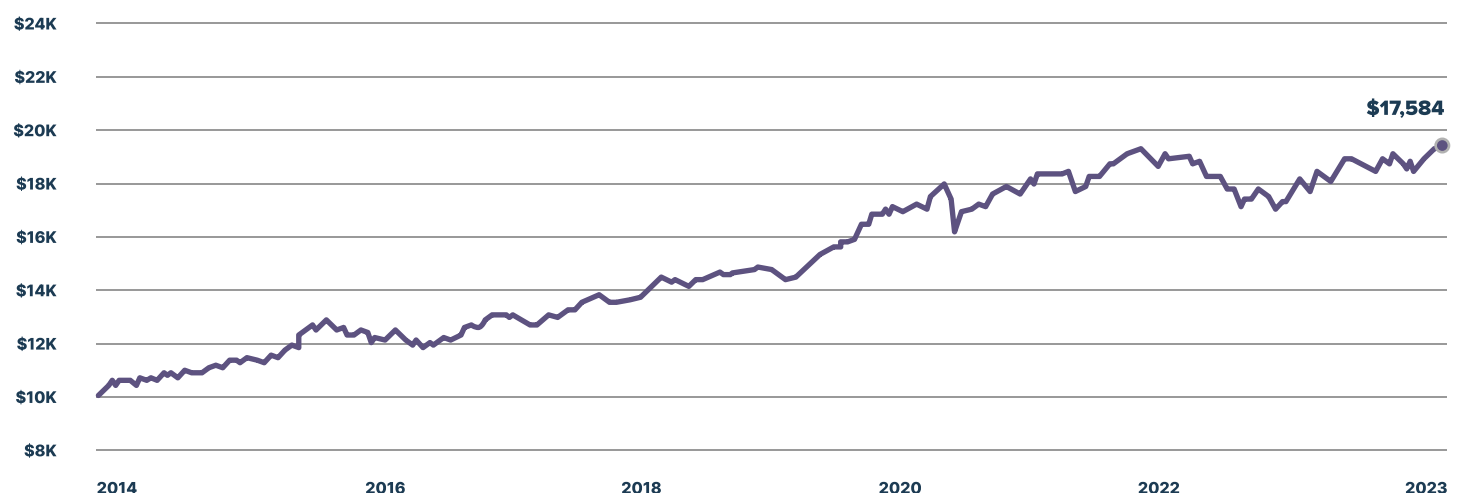
Historical performance

Period	1 Year	3 Years (p.a.)	5 Years (p.a.)	Inception (total)
Return	8.6%	1.8%	5.0%	75.8%

Calendar year performance

Period	2023	2022	2021	2020	2019	2018	2017	2016	2015
Return	8.6%	-6.3%	3.5%	5.9%	13.9%	1.9%	6.6%	6.0%	1.4%

Value of \$10,000 since inception



Grossed up income is calculated for each ETF by summing the prior 12-months per unit distributions, adding any declared franking credits based on the most recent financial year, then dividing by the closing ETF price at the end of the relevant period. Performance is after-fee as at 31 December 2023. Returns are after ETFs fees and after Stockspot fees based on the Silver tier. We use the compound time weighted return methodology including the reinvestment of distributions but excluding individual tax. The Stockspot portfolios have been published since July 2013 and open for investment since May 2014. Investing in financial products involves risk. Past performance of financial products is no guarantee of future performance.



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Portfolio information

Asset class	Investment	Allocation
Growth		
Australian shares	Vanguard Australian Shares Index ETF	18.6%
Global shares	iShares Global 100 ETF	7.1%
Emerging market shares	iShares Emerging Markets ETF	14.3%
Defensive		
Bonds	iShares Core Composite Bond ETF	45.2%
Gold	Global X Physical Gold (GOLD)	14.8%

Sector	
Communication services	7.0%
Energy	5.9%
Industrials	6.1%
Technology	15.2%
Basic materials	14.1%
Consumer cyclical	9.8%
Financial services	22.2%
Real estate	3.6%
Consumer defensive	6.0%
Health care	8.1%
Utilities	1.4%

Country	
Americas	15.5%
North America	13.2%
Latin America	2.3%
Greater Europe	6.9%
United Kingdom	1.1%
Europe (developed)	2.4%
Europe (emerging)	0.6%
Africa/Middle East	2.9%
Greater Asia	77.7%
Japan	0.4%
Australasia	54.8%
Asia (developed)	7.9%
Asia (emerging)	14.5%



Get in touch and speak with a Stockspot adviser today

[Stockspot.com.au](https://stockspot.com.au)

Enquiries@stockspot.com.au

(02) 8091 8090



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