

# Stockspot Topaz Portfolio (High growth)

## Investment objective

The Topaz portfolio aims for higher returns with higher short-term fluctuations. It has more growth investments like Australian and global shares to boost your return potential while diversifying across countries, assets and sectors to achieve attractive long term risk-adjusted returns. There are also some defensive assets like bonds and gold which help to cushion market dips

## 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
2.92%	7 years+	0.28% p.a.	Based on investment balance. See our <a href="#">pricing page</a> .

## Historical performance

Period	1 Year	3 Years (p.a.)	5 Years (p.a.)	10 Years (p.a.)	Inception (total)
Return	19.3%	16.7%	11.0%	10.2%	227.9%

## Calendar year performance

Period	2025	2024	2023	2022	2021	2020	2019	2018	2017	2016	2015
Return	19.3%	19.0%	11.8%	-4.6%	10.2%	6.3%	19.9%	0.1%	10.2%	9.0%	2.8%

## Value of \$10,000 since inception





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## Portfolio information

Asset class	Investment	Allocation
<b>Growth</b>		
Australian shares	Vanguard Australian Shares Index ETF	47.3%
Global shares	iShares Global 100 ETF	9.8%
Emerging market shares	iShares Emerging Markets ETF	20.9%
<b>Defensive</b>		
Bonds	iShares Core Composite Bond ETF	9.7%
Gold	Global X Physical Gold (GOLD)	12.3%

Sector	
Communication services	6.2%
Energy	3.8%
Industrials	6.6%
Technology	15.6%
Basic materials	15.3%
Consumer cyclical	9.0%
Financial services	26.8%
Real estate	4.5%
Consumer defensive	3.9%
Health care	6.9%
Utilities	1.5%

Market maturity	
Developed markets	83.7%
Emerging markets	16.3%



Get in touch and speak with a Stockspot adviser today

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