

# Stockspot Sustainable Topaz Portfolio (High growth)

## Investment objective

The Sustainable 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
3.70%	7 years+	0.47% p.a.	Based on investment balance. See our <a href="#">pricing page</a> .

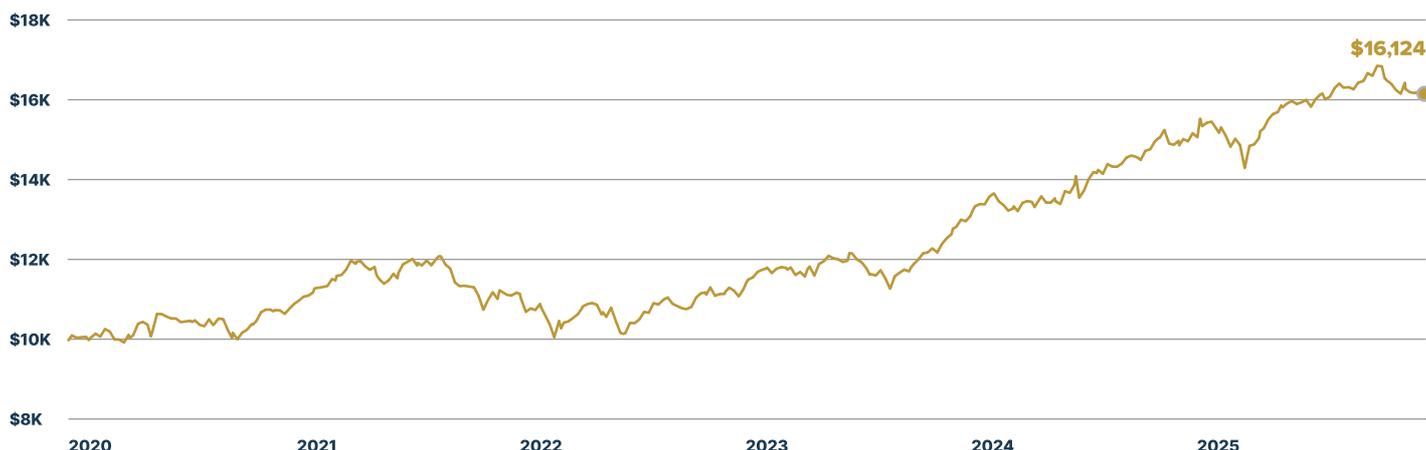
## Historical performance

Period	1 Year	3 Years (p.a.)	5 Years (p.a.)	Inception (total)
Return	8.5%	14.4%	9.0%	61.2%

## Calendar year performance

Period	2025	2024	2023	2022	2021
Return	8.5%	20.9%	14.0%	-11.3%	15.1%

## 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-fees as at 31 December 2025. Returns are after ETFs fees and after Stockspot fees based on the Gold 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.

# Stockspot Sustainable Topaz Portfolio (High growth)

## Portfolio information

Asset class	Investment	Allocation
<b>Growth</b>		
Australian shares	BetaShares Australian Sustainability Leaders ETF	47.3%
Global shares	BetaShares Global Sustainability Leaders ETF	9.8%
Global shares	Vaneck Vectors MSCI International Sustainable	20.9%
<b>Defensive</b>		
Bonds	iShares Core Composite Bond ETF	9.7%
Gold	Global X Physical Gold	12.3%

Sector	
Communication services	9.5%
Energy	0.0%
Industrials	5.1%
Technology	19.3%
Basic materials	3.1%
Consumer cyclical	6.9%
Financial services	22.4%
Real estate	12.4%
Consumer defensive	3.7%
Health care	17.5%
Utilities	0.6%

Market maturity	
Developed markets	99.4%
Emerging markets	0.6%



Get in touch and speak with a Stockspot adviser today

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

[enquiries@stockspot.com.au](mailto:enquiries@stockspot.com.au)

**(02) 8091 8090**



**Australia's Largest Online  
Investment Adviser<sup>^</sup>**  
Since 2014



<sup>^</sup>Automated investing service providing personal advice. Based on publicly available information.

Stockspot ABN 87 163 214 319 is a licensed Australian Financial Services provider (AFSL 536082) regulated by ASIC. Any advice contained in this report is general advice only and has been prepared without considering your objectives, financial situation or needs. Before making any investment decision we recommend that you consider whether it is appropriate for your situation and seek appropriate taxation and legal advice. Investing into financial products involves risk. Past performance of financial products is no guarantee of future performance. Please read our Financial Services Guide before deciding whether to obtain financial services from us. © 2025 Stockspot.