

Fund Profile:

Nucleus Wealth Australian Leaders

Features

Number of stocks:	23-27
Benchmark:	ASX 20
Hedging:	None
Target Cash:	1.0%
Maximum Cash:	5.0%

Suggested Minimums¹:

- Initial Investment	\$10,000
- Additional deposits	\$1
- Time Invested	5 years

Fees:

- Investment fee	0.17%
- Indirect Cost Ratio ²	0.00%
- Performance Fee	None

Investor Suitability

Investors who have a high tolerance for risk and a long term investment timeframe.

Risk Levels

Very High. Negative return 6 years in every 20 years.

Available as a Separately Managed Account on the following platforms:

Praemium, Interactive Brokers

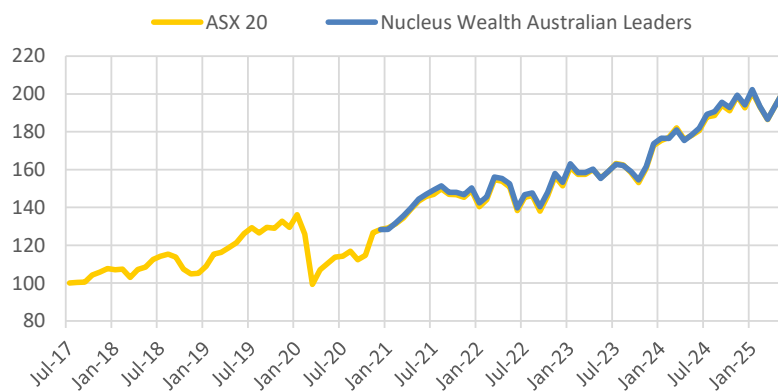
Investment Objective

This is a passive strategy designed to provide a (gross of fees) return in line with the S&P/ASX 20 Accumulation Index over rolling five year periods.

Return to 30 Jun 2025

	1m %	3m %	1y %	3y % p.a.	Incept. % p.a. ⁴
Nucleus Wealth Australian Leaders					
- Pre fees	1.8	9.6	12.4	13.5	10.9
- Post investment fees	1.7	9.5	12.0	13.2	10.6
Investment Objective:					
- ASX 20	1.5	9.4	12.8	13.8	10.8

Cumulative Returns



Investment Strategy

The model provides exposure to a portfolio of the 25 largest companies on the ASX. Securities are selected using a rules-based approach.

1. Portfolios with low balances may deviate performance due to share parcel sizes. 2. Based on strategic asset position. May be higher/lower based on tactical positions. 3. Administration fees vary on account type, amount invested and platform used. See PDS for details. 4. Inception is 30 Dec 2020.

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