

## WELINK SUPERFUND

### INVESTMENT STRATEGY

#### Objectives

The Trustee of the fund aims to:

- provide superannuation benefits to members to meet their retirement interests,
- ensure that an appropriate mix of assets are owned by the fund.

The Trustees general investment objective is to achieve real medium to longer term growth, while maintaining a low level of capital volatility.

To achieve this objective, the Trustees have determined the fund will have the ability to invest in the following areas:

- equities and stocks including the participation in dividend reinvestment programs, rights issues and any other investments offered in this area;
- property trusts and associated investments;
- managed investments and associated products thereof;
- direct property investment;
- solicitors first mortgages and associated investments thereof;
- cash/interest bearing deposits; and
- any other investment legally able to be made.

It is noted that the Trustees may from time to time seek professional advice in the formulation of an investment strategy.

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In determining this strategy the Trustees have taken into consideration the aspects of the investment in accordance with the fund's objectives and appropriate legislation.

#### Policies

The policies adopted by the Trustee to adhere to these objectives are:

continual monitoring of the performance of the funds investments, rates of return, risk analysis and expected cash flow requirements.

balancing the asset portfolio as a result of adjustments to market conditions.

The Trustees will ensure investments continue to comply with the strategy, however, the Trustees reserve the right to alter the strategy at any time.

BIN CUI BIN CUI Date 01/07/2021

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