

Davidson Self-Managed Super Fund Strategy for Financial Year 2019/2020

Meeting held on the 19th of June, 2019. Present at the meeting were: Russell John Davidson, Gail Patricia Davidson

- Minutes from previous meeting were read and discussed and both parties were satisfied with the outcome and results of the investment strategy that was adopted for that year.
- Stocks that were previously held in 2018/2019 were reviewed, results, growth and dividends analysed.
- Performance review of dividends from all stocks was satisfactory, and allowing for franking credits the return from stocks was approx. 5.2% .The overall growth of the fund was up 12.40% on the previous year
- Investment strategy for the upcoming year was also discussed and agreed upon by both parties that there would be little change for the 2019/2020 year. Stocks are to continue to be held in the Australian stock market (all Australian shares). The interest paid from the banks for long term investments is approx. 1.50% which is unacceptable and could be even less.

Signed: RJ Davidson



Signed: GP Davidson


