

Asset Allocation

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SuperRatings’ Asset Allocation Application provides access to our comprehensive list of product option allocation data across 400 + products and 6,000 investment options.

With 40+ Growth/Defensive assets to choose from features and functionality of the Asset Allocation App include:

- 1** ‘Actual’, ‘Benchmark’ and ‘Range’ Allocations available.
- 2** Current and historical data access.
- 3** Quarterly updates.

4 Refine and Filter search by Growth / Defensive %, Option type & default.

5 Save searches and/or Export results to Excel.

6 Link to ‘more detailed information’ including option specific details, objective description and Asset Allocation Summary (Printable).

Originally available as a quarterly spreadsheet only, in July 2011 we enhanced the product to be an online App in our web based portal. This means subscriber organisations now have all our current and historical Asset Allocation data at their fingertips and can tailor research specific to their requirements.

Sample of Asset Allocation

Option Name	Option Type	AA Type	Default Option	Effective Date	FCRS Option	Growth Ratio	Aus Shares	Int Shares	Property
Acumen - Australian Shares	Australian Shares	Actual	No	30/6/2008	Yes	100.00	100.00	-	-
Acumen - Australian Shares	Australian Shares	Range	No	10/12/2010	Yes	95.00:100.00	95.00:100.00	-	-
Acumen - Australian Shares	Australian Shares	Benchmark	No	19/10/2010	Yes	100.00	100.00	-	-
Acumen - Balanced	Conservative Balanced (41-59)	Benchmark	No	30/6/2014	Yes	55.00	14.00	21.00	7.00
Acumen - Balanced	Conservative Balanced (41-59)	Range	No	10/12/2010	Yes	30.00:80.00	13.00:23.00	10.00:20.00	3.00:13.00
Acumen - Balanced	Conservative Balanced (41-59)	Actual	No	30/6/2014	Yes	55.00	15.00	21.00	7.00
Acumen - Basic Cash	Cash	Range	No	10/12/2010	No	-	-	-	-
Acumen - Basic Cash	Cash	Benchmark	No	19/10/2010	No	-	-	-	-
Acumen - Basic Cash	Cash	Actual	No	30/6/2011	No	-	-	-	-
Acumen - Bond	Diversified Fixed Interest	Actual	No	30/6/2011	Yes	-	-	-	-
Acumen - Bond	Diversified Fixed Interest	Range	No	10/12/2010	Yes	-	-	-	-
Acumen - Bond	Diversified Fixed Interest	Benchmark	No	19/10/2010	Yes	-	-	-	-
Acumen - Capital Stable	Capital Stable (20-40)	Range	No	10/12/2010	Yes	11.00:60.00	5.00:15.00	3.00:13.00	1.00:11.00
Acumen - Capital Stable	Capital Stable (20-40)	Actual	No	30/6/2014	Yes	35.00	8.00	13.00	5.00
Acumen - Capital Stable	Capital Stable (20-40)	Benchmark	No	30/6/2014	Yes	35.00	8.00	12.00	5.00
Acumen - Cash	Cash	Actual	No	30/6/2008	Yes	-	-	-	-
Acumen - Cash	Cash	Benchmark	No	19/10/2010	Yes	-	-	-	-
Acumen - Cash	Cash	Range	No	10/12/2010	Yes	-	-	-	-
Acumen - Cash Plus	Secure (0-19)	Benchmark	No	19/10/2010	Yes	-	-	-	-
Acumen - Cash Plus	Secure (0-19)	Actual	No	30/6/2005	Yes	-	-	-	-