

Aggressive Fund Introduction



Fund Overview

The Milford Aggressive Fund is an actively managed equity fund investing primarily in international shares with a moderate allocation to Australasian shares. The Fund is a higher risk investment and typically fully invested in share markets with the aim of maximising the Fund's growth potential.

Investment Objective

To maximise capital growth over a minimum 10-year time horizon.

Investment Strategy

The Fund invests primarily in international shares, with a moderate allocation to Australasian shares.

The Fund's foreign currency exposure is actively managed, with the neutral currency exposure being 24.5%. This can be increased or decreased depending on market conditions. The Fund is typically fully invested but can invest in cash up to a up to a maximum level of 30%.

Who the Fund suits

Investors looking for:

- An equity focused portfolio
- Ability to maximise capital growth over a minimum 10-year timeframe
- A higher risk choice for their investment
- An investment option which can be a stand-alone investment or combined with other Milford funds to create your own fund mix.

Key Fund Facts

Inception date	June 2021
Recommended investment timeframe	10 years
Growth/Income target	95% / 5%
Base Fund fee	1.15%
Performance fee	There is no direct performance fee but the Fund may invest into related Milford funds that charge performance fees.
Neutral currency exposure	24.5%
Fund pricing	Daily
Risk Indicator	Lower risk 1 2 3 4 5 6 7 Higher risk Potentially lower returns Potentially higher returns

Neutral Asset Allocation

Asset class	Neutral	Min	Max
Cash and cash equivalents	5%	-10%	30%
Australasian Equities	25%	0%	50%
International Equities	70%	50%	100%

Our Team



Stephen Johnston
Portfolio Manager



Jonathan Windust
Co-Portfolio Manager

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