

IPS Index Base 50 (Pension)

28 February 2025

Product Summary

A diversified investment which is made up of passively managed assets designed to achieve moderate returns over the medium-term.

Asset Class	Mixed Asset	Total Fees and Costs	0.31%
Style	Passive		
FE Peer Group ¹	Mixed Asset - Balanced		

Performance[^]

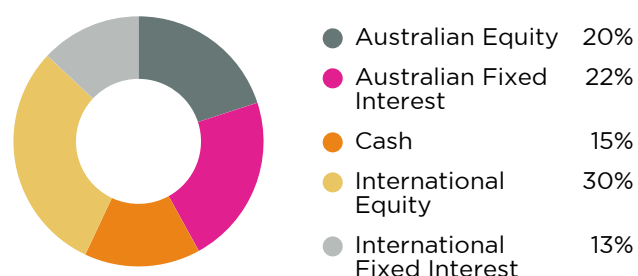
	1 Month (%)	3 Months (%)	6 Months (%)	1 Year (%p.a.)	3 Years (%p.a.)	5 Years (%p.a.)	7 Years (%p.a.)	Since Inception (%p.a.)
WealthFoundations Pension-CLAL Index Base 50 (Pension)	-1.17	0.48	4.55	9.22	6.82	6.18	-	6.07
FE Peer Group Average	-0.16	1.11	3.67	7.39	4.70	4.84	-	4.53

Growth of \$100 since inception[^]



● WealthFoundations Pension-CLAL Index Base 50 (Pension) ● Peer Group Average: Mixed Asset - Balanced

Asset Class Breakdown



Geographical Allocation



Performance of underlying funds[^]

	1 Month (%)	3 Months (%)	6 Months (%)	1 Year (%p.a.)	3 Years (%p.a.)	5 Years (%p.a.)
CVW WF-CLAL Cash Fund (Pension)	0.18	0.95	2.08	4.40	3.43	2.09
CVW WF-CLAL Index AUS Shrs (Pension)	-3.95	-2.65	3.49	10.52	9.48	9.11
CVW WF-CLAL Index Fixed Intst (Pension)	0.25	0.18	-0.14	2.53	-1.14	-1.59
CVW WF-CLAL Index Intl Shrs (Pension)	-1.65	2.16	10.71	17.00	14.18	13.52

Top 10 Holdings

For the most recent top 10 holdings for each fund, please refer to clearview.com.au/Top10Holdings

¹ The FE Peer Group is the group of all funds within the relevant FE fundinfo category that each product is compared against.

[^] Performance data is after applicable fees and taxes, and assumes the reinvestment of distributions. Past performance is not indicative of future performance. Due to the flexibility of rebalancing and variations between accounts, performance shown is indicative only and, for example, assumes that there are no deposits, withdrawals nor exceptions to regular rebalancing in the model portfolio.

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