

# CFS Index Managed Portfolios

CFS Index portfolios are designed to meet diverse client preferences, including fee sensitivity and specific financial objectives, while offering consistency and simplicity for advisers.



## Simple diversification

Multi-sector index investing offers quick and easy access to a wide range of asset types, sectors and regions.



## Cost efficiency

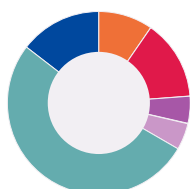
Low-cost index portfolios can help you reduce investment costs, improving overall returns.



## Zero admin fees

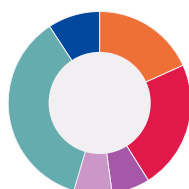
Take advantage of zero administration fees and rebates through CFS Edge Accelerate 100.

## CFS Index portfolios



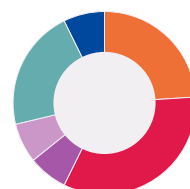
### CFS Index 30

30/70 | 0.296% | 3 years<sup>1</sup>



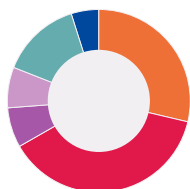
### CFS Index 50

50/50 | 0.298% | 5 years<sup>1</sup>



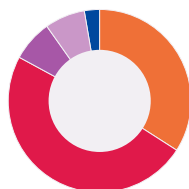
### CFS Index 70

70/30 | 0.294% | 5 years<sup>1</sup>



### CFS Index 80

80/70 | 0.301% | 5 years<sup>1</sup>



### CFS Index 99

99/1 | 0.297% | 7 years<sup>1</sup>

■ Australian shares  
■ Global shares

■ Property  
■ Infrastructure

■ Fixed income  
■ Cash



<sup>1</sup> Growth/Defensive ratio | Total ongoing fees & costs (pa) | Minimum suggested timeframe. This fee is GST inclusive, net of any input tax credits (including reduced input tax credits). Refer to the CFS Managed Account PDS dated 1 November 2024 for more information.

## Keep fees low with CFS Edge Accelerate Series

The CFS Edge Accelerate Series lets you combine low cost managed accounts and sophisticated investment options in one single account, on one contemporary platform.

A managed account made up of 100% Accelerate Funds – including CFS Index – attracts a 100% platform admin fee discount in addition to discounted investment fees.

## Why invest with CFS?

We have an experienced team of investment professionals that specialise in constructing and managing multi and single asset portfolios across active, smart beta and market cap index strategies. Our investment team has an enviable track record of navigating investment market cycles and partnering with advisers to deliver their clients' objectives.



### Experience

A long and stable track record in helping advisers deliver diversified, professionally managed portfolios for their clients.



### Scale

Our team of investment experts manage over \$68 billion<sup>2</sup>, giving investors better access to institutional-only offerings.



### Expertise

Responsible for building and managing multiple multi-sector and single-sector investment options across index, enhanced index and fully active products.

2 As at June 2024.

## Additional tools and resources



[Product Disclosure Statement](#)



[Website](#)



[CFS Investment team](#)

## Find out more

To find out more about CFS Index Portfolio, please contact your local [Business Development Manager](#), call Adviser Services on **13 18 36** (8:30am to 6pm Sydney time) or visit [cfs.com.au/investments](https://cfs.com.au/investments)

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