



Self-Managed Invest

A game changer for SMSFs.

Self-Managed Invest (SMI) gives your clients unique access to investment opportunities, real control and a supportive experience.



Features for SMSF clients.

SMI can help you and your SMSF clients build diversified portfolios with the aim to deliver growth, income and a better future.

Access to unique assets

 **Unlisted domestic and international property**
(institutional grade)

 **Unlisted infrastructure**

 **Private equity and venture capital**

A range of investment options

Providing your clients with access to a wide range of assets and investment strategies, typically only available to industry fund members.

Pre-mixed

- Balanced
- Indexed Balanced
- Capital Stable
- Conservative Balanced
- Socially Responsible Investment - Balanced

Sector-specific

- Infrastructure
- Property
- Australian Shares – Indexed
- Diversified Fixed Interest – Indexed
- International Shares – Emerging Markets


\$10k **Low initial investment plus daily liquidity**

\$165 p.a. **Admin fee**

So you can invest the way you want to.

plus Trustee fee of **0.0155% p.a.** of your account balance

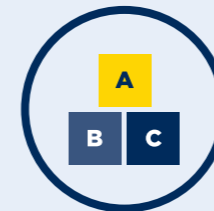
\$240 **Joining fee**

 **Simple, digital application and experience**

For no-hassle admin.

Discover the benefits for your clients.

Your structure, our performance, your SMSF clients' life, plans and purpose.



Greater diversification
to protect your clients' portfolios.



More opportunity
to build your clients' portfolio.



Investments that build
retirement income.



A unique alternative
to traditional defensive and growth investments.

Features for advisers.

With Hostplus SMI we make it easy to help you deliver great value to your clients.



Xplan Integrated Data feeds and account establishment



Simple digital application and management



Reporting and compliance



A complete view of your clients' portfolios



Tools and resources to support your clients

Expertise that delivers.

We have the scale and experience that aims to deliver to your SMSF clients.

As of 8 December 2023

1.7m
members (approx) in the **Hostplus Superannuation Fund**

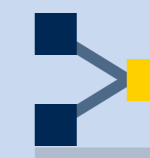
Approx

\$100bn
in total funds under management for **Hostplus Superannuation Fund and Hostplus Pooled Superannuation Trust**



World-class asset managers

From our in-house team plus IFM Investors, BlackRock and many others.



10 to 20-year investment strategies

Long-term thinking that aims to deliver.