

# BT Westpac Active Moderate Trust

## Fund Information

Launch Date	04/01/2012
Sector	Diversified Balanced
Domicile	New Zealand
Currency	NZD
Price (Bid/Mid) (as at 09/04/2019)	\$1.57
Manager name	Francois Richeboeuf, Stephen Hong
Fund Size	\$980.79m at 31/03/2019
Number of Holdings	n/a
Yield	n/a
Dividend dates	
MII	\$5000.00
Minimum Regular Savings	\$1200.00
AMC	1.27%
Performance Fee	0%
TFF	1.33%
Launch Price	n/a
Legal Structure	Unit Trust
Membership Fee	n/a

## Fund Objective

The Fund aims to provide moderate returns over the medium term. The Fund has a higher benchmark allocation to income assets than to growth assets. Volatility is expected to be higher than the Westpac Active Conservative Trust but lower than the Westpac Active Balanced Trust.

## Breakdown

No breakdown data available for BT Westpac Active Moderate Trust

# BT Westpac Active Moderate Trust

## Cumulative Performance (%) (as at 29/03/2019)

	3m	6m	1 yr	3 yrs	5 yrs	10 yrs	Since launch
BT Westpac Active Moderate Trust	5.20	1.96	5.55	16.80	33.98	n/a	57.41
Diversified Balanced	6.29	0.37	5.75	18.70	37.25	111.81	n/a



## Discrete Performance (%) (as at 29/03/2019)

	0-1 yr	1-2 yrs	2-3 yrs	3-4 yrs	4-5 yrs
BT Westpac Active Moderate Trust	5.55	6.03	4.37	3.57	10.75
Diversified Balanced	5.75	5.63	6.26	2.81	12.48

