

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 26/11/2018)	\$1.49
Manager name	Francois Richeboeuf, Stephen Hong
Fund Size	\$919.33m at 30/09/2018
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.

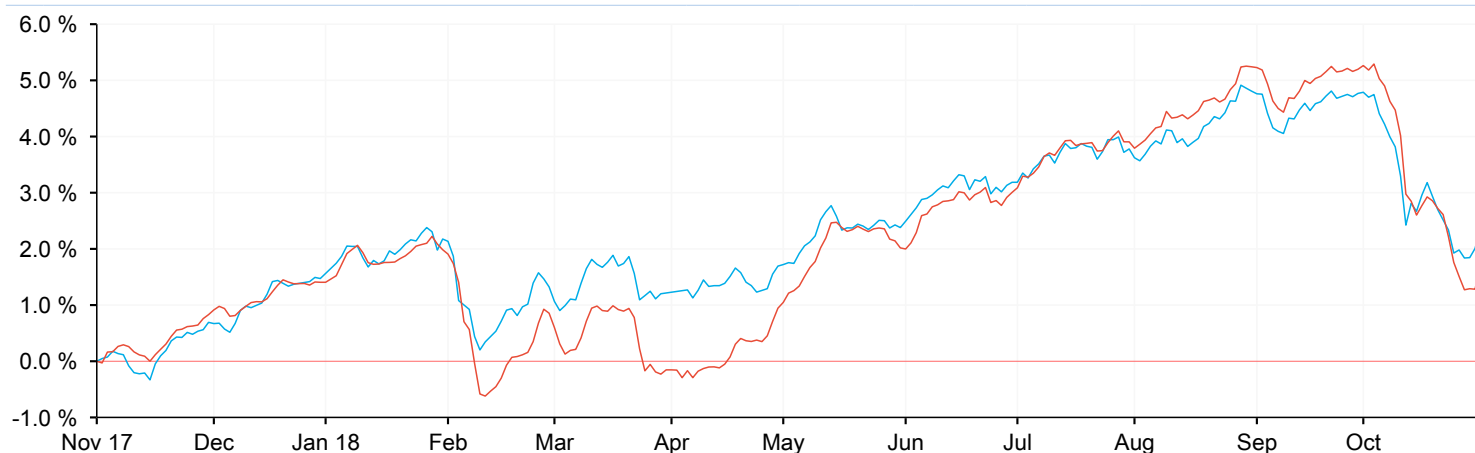
Breakdown

No breakdown data available for BT Westpac Active Moderate Trust

BT Westpac Active Moderate Trust

Cumulative Performance (%) (as at 31/10/2018)

	3m	6m	1 yr	3 yrs	5 yrs	10 yrs	Since launch
BT Westpac Active Moderate Trust	-1.35	0.67	2.30	13.84	31.23	n/a	50.90
Diversified Balanced	-2.09	0.78	1.80	15.14	33.88	96.30	n/a



Discrete Performance (%) (as at 31/10/2018)

	0-1 yr	1-2 yrs	2-3 yrs	3-4 yrs	4-5 yrs
BT Westpac Active Moderate Trust	2.30	7.40	3.61	6.92	7.81
Diversified Balanced	1.80	10.17	2.67	7.14	8.53

