



# Investing for life – making the most of time in the market

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**Blair Modica**  
**Director – Adviser Services**





# Important information

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# About BetaShares

**71**

Widest range of  
exchange traded  
products  
on the ASX



**\$22B**

in assets under  
management



**Providing intelligent  
investment solutions**

**Built to help Australian  
investors meet their  
financial objectives.**



Founded in  
**2009**



**100+**  
Colleagues  
across Australia  
and New Zealand

\* Information as at 31 May 2022.

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# Blair Modica

## Director – Adviser Services

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Responsible for:

- ▶ Supporting the distribution of BetaShares funds to advisers across the Victoria & Tasmanian regions.
  - ▶ Prior to his role at BetaShares, Blair previously worked at Macquarie Bank in Distribution and Key Account roles within the Specialised Investments team. He has also held roles within NAB Wholesale Banking.
  - ▶ Blair holds a Bachelor of Arts (Politics & History) and a Master of Management (Finance) from Melbourne University.
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## Today's agenda



**ETF landscape & asset allocation**



**Investing for life stages – looking at the long term**



**Using ETFs in your portfolio**





# ETF landscape & asset allocation





# Why people are choosing ETFs

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**Cost-effective**



**Liquidity**



**Diversification**



**Transparency**



**Ease of access**

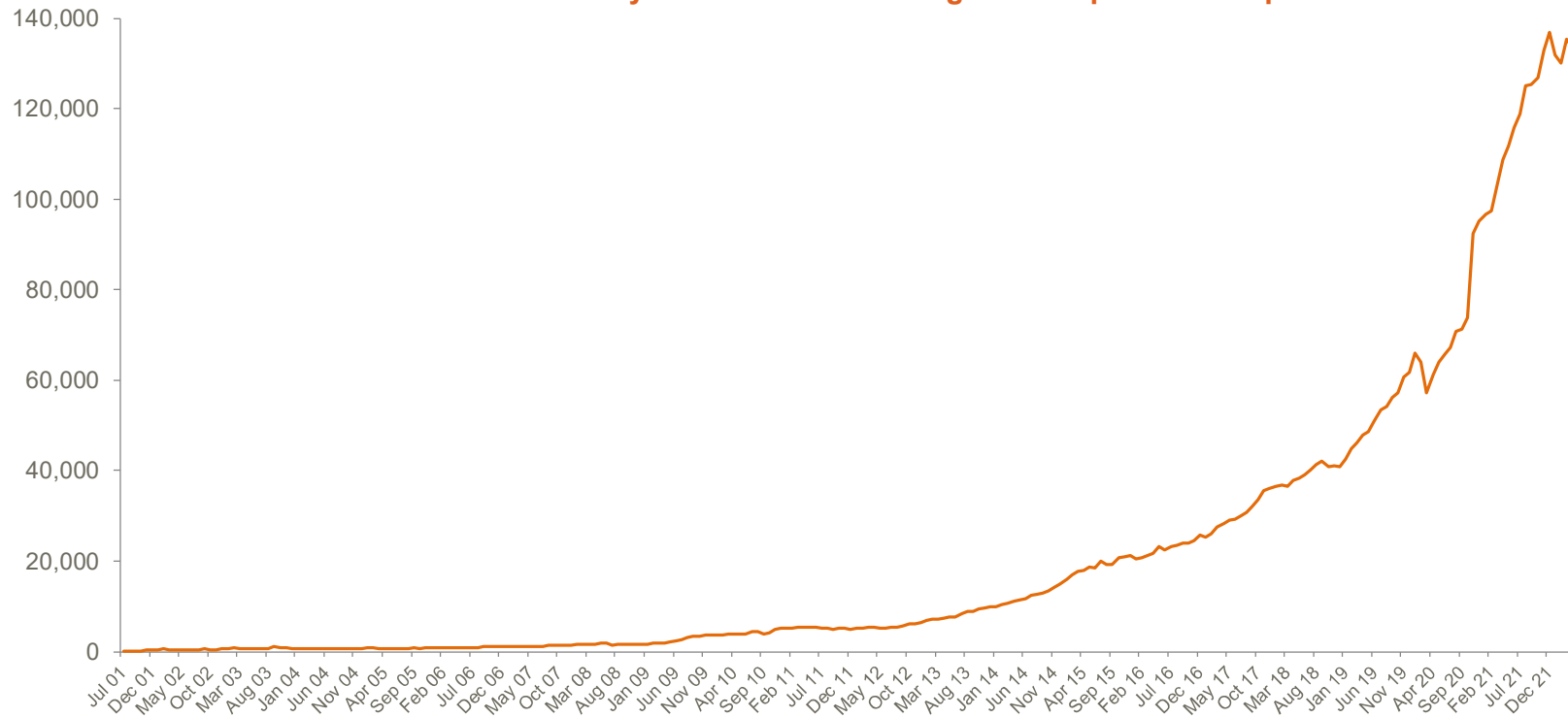


**Lots of choice!**



# Growth of the Australian ETF Industry

**Australian ETF Industry – Funds Under Management: April 2001 – April 2022**



CAGR: Compound Annual Growth Rate  
Source: ASX, Chi-X, BetaShares

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# What is asset allocation?

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**Blending exposure** to different investments (or “asset classes”) with either/both:

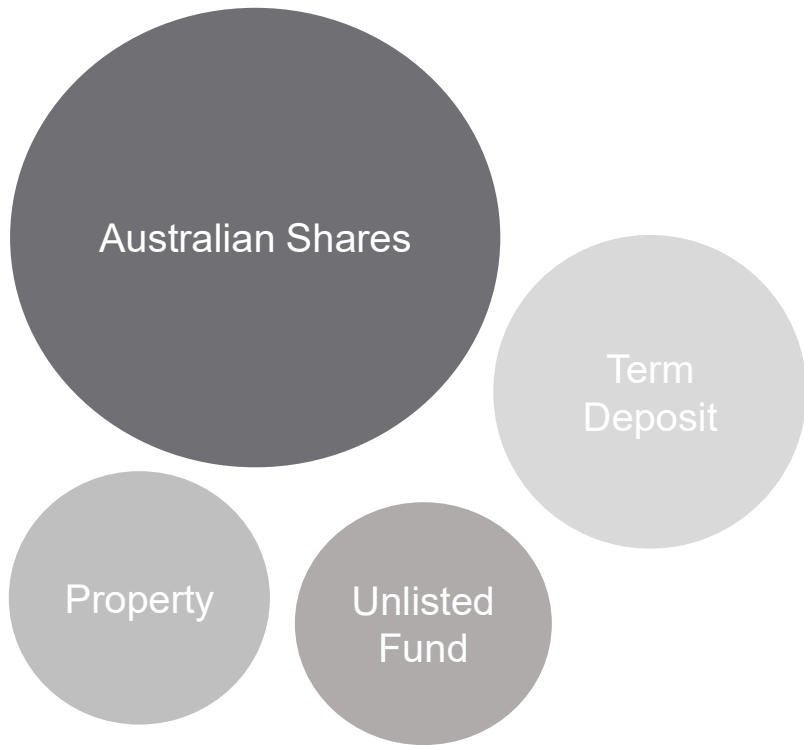
- ▶ different risk/return profiles
- ▶ low return correlation.

**Calibration** of an investor’s portfolio risk/return profile to their specific needs and “comfort” level

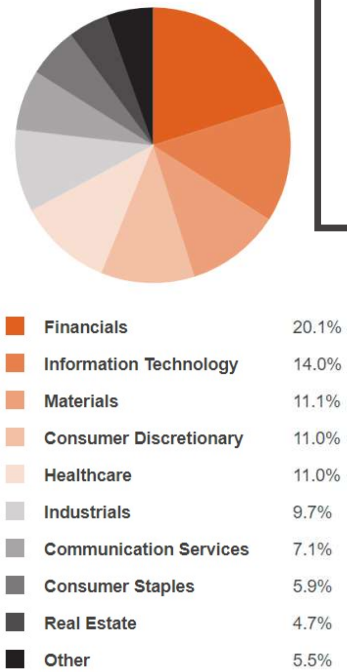
**Enhanced risk-adjusted returns** through diversification of a “free lunch”



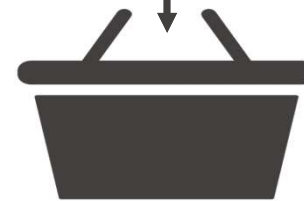
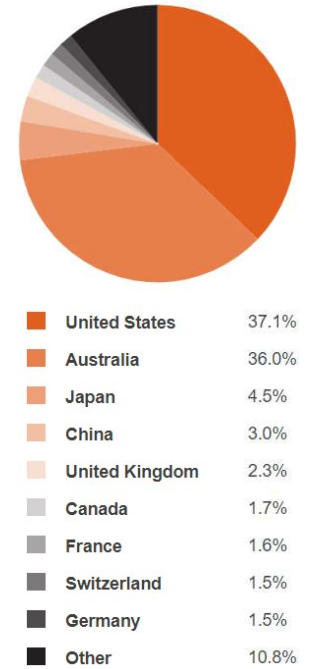
# A 'diversified' portfolio



## Asset allocation\*



## Country allocation\*



In 2001

In 2021

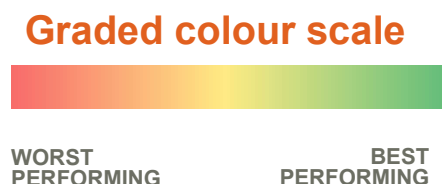
\*Example provided for illustrative purposes only. Not a recommendation to invest or adopt any investment strategy.  
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# Asset class and investment exposure return comparisons



## Financial Year Returns

	Cash	Aust. B	Global B	Gold (\$US)	REITS	ASX	World \$A
Jun-95	7.1%	11.9%	13.5%	-0.4%	7.9%	7.0%	13.3%
Jun-96	7.8%	9.5%	10.5%	-1.1%	3.6%	14.3%	6.6%
Jun-97	6.8%	16.8%	11.8%	-12.2%	28.5%	27.6%	27.8%
Jun-98	5.1%	10.9%	10.9%	-11.1%	10.0%	2.0%	38.0%
Jun-99	5.0%	3.3%	5.2%	-11.6%	4.3%	14.8%	8.6%
Jun-00	5.6%	6.2%	3.9%	10.3%	12.1%	17.9%	25.5%
Jun-01	6.1%	7.4%	10.1%	-6.5%	5.6%	9.1%	-7.0%
Jun-02	4.7%	6.2%	8.7%	16.1%	12.5%	-4.7%	-22.1%
Jun-03	5.0%	9.8%	12.5%	10.2%	12.1%	-1.7%	-17.7%
Jun-04	5.3%	2.3%	4.1%	13.8%	17.3%	21.6%	20.3%
Jun-05	5.6%	7.8%	11.6%	10.5%	17.0%	26.4%	2.4%
Jun-06	5.8%	3.4%	1.2%	41.4%	18.1%	23.9%	21.8%
Jun-07	6.4%	4.0%	5.7%	5.5%	25.9%	28.7%	9.9%
Jun-08	7.3%	4.4%	7.9%	42.4%	-36.3%	-13.4%	-19.2%
Jun-09	5.5%	10.8%	10.0%	0.1%	-42.1%	-20.1%	-15.4%
Jun-10	3.9%	7.9%	11.5%	34.1%	20.4%	13.1%	7.7%
Jun-11	5.0%	5.5%	6.9%	20.8%	5.9%	11.7%	2.6%
Jun-12	4.7%	12.4%	11.6%	6.5%	11.0%	-6.7%	-1.5%
Jun-13	3.3%	2.8%	4.6%	-22.7%	24.2%	22.8%	31.3%
Jun-14	2.7%	6.1%	7.8%	7.5%	10.7%	17.4%	19.7%
Jun-15	2.6%	5.6%	5.6%	-11.7%	20.3%	5.7%	23.9%
Jun-16	2.2%	7.0%	9.3%	12.8%	24.6%	0.6%	0.2%
Jun-17	1.8%	0.2%	0.5%	-6.1%	-6.2%	14.1%	15.7%
Jun-18	1.8%	3.1%	1.9%	0.9%	13.0%	13.0%	15.6%
Jun-19	2.0%	9.6%	7.2%	12.5%	19.3%	11.5%	12.2%
Jun-20	0.8%	4.2%	5.2%	26.3%	-21.3%	-7.7%	4.4%
Jun-21	0.1%	-0.8%	-0.2%	-0.6%	33.2%	27.8%	28.8%
# years	27	27	27	27	27	27	27
# neg years	0	1	1	10	4	6	6
Stdev	2.1%	4.0%	3.9%	16.2%	17.8%	13.2%	16.1%
Max	7.8%	16.8%	13.5%	42.4%	33.2%	28.7%	38.0%
Min	0.1%	-0.8%	-0.2%	-22.7%	-42.1%	-20.1%	-22.1%
Correl to ASX	0.0	-0.3	-0.4	-0.2	0.7	1.0	0.7



Source: Bloomberg. Does not compare all asset classes and investment exposures. Past performance is not an indicator of future performance.

## An expert view

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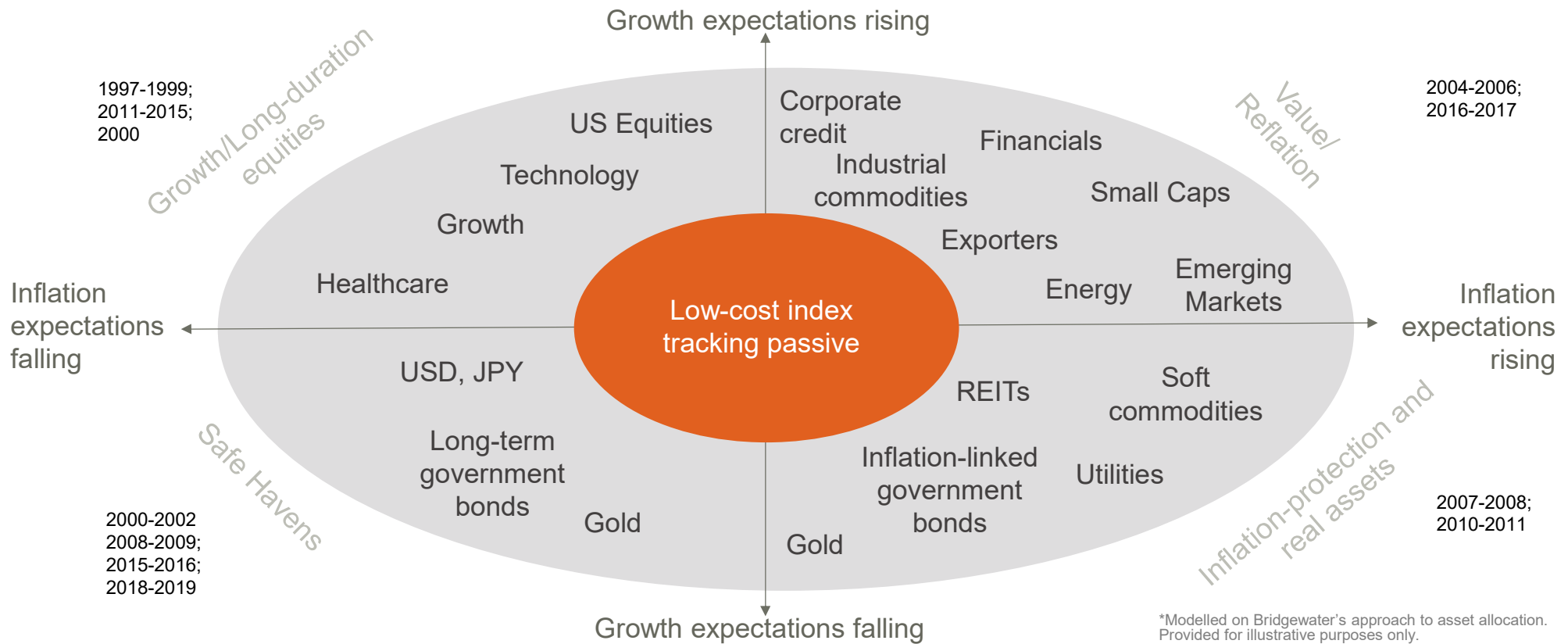
“You should have a strategic asset allocation mix that assumes that you don't know what the future is going to hold.”

**Ray Dalio**

American billionaire investor, hedge fund manager and founder of investment firm Bridgewater Associates, one of the world's largest hedge funds.



# Positioning a robust core with relevant satellite exposures





# Risk profiling to suit your asset allocation

## Risk profiles available

■ Growth  
■ Defensive

Conservative



Moderate



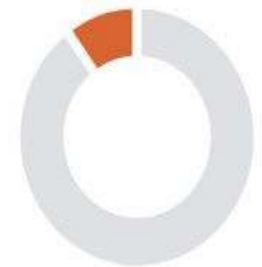
Balanced



Growth



High Growth



Long-run return aim	CPI + 1.5% p.a.	CPI + 2.25% p.a.	CPI + 3.25% p.a.	CPI + 4.0% p.a.	CPI + 5.5% p.a.
Risk aim (estimated)*	< 1 negative annual returns over 20 years	< 2 negative annual returns over 20 years	< 3 negative annual returns over 20 years	< 4 negative annual returns over 20 years	< 6 negative annual returns over 20 years

\*This is not a complete assessment of all applicable forms of investment risk. Investors should still ensure they are comfortable with risks and potential losses associated with their chosen investment option



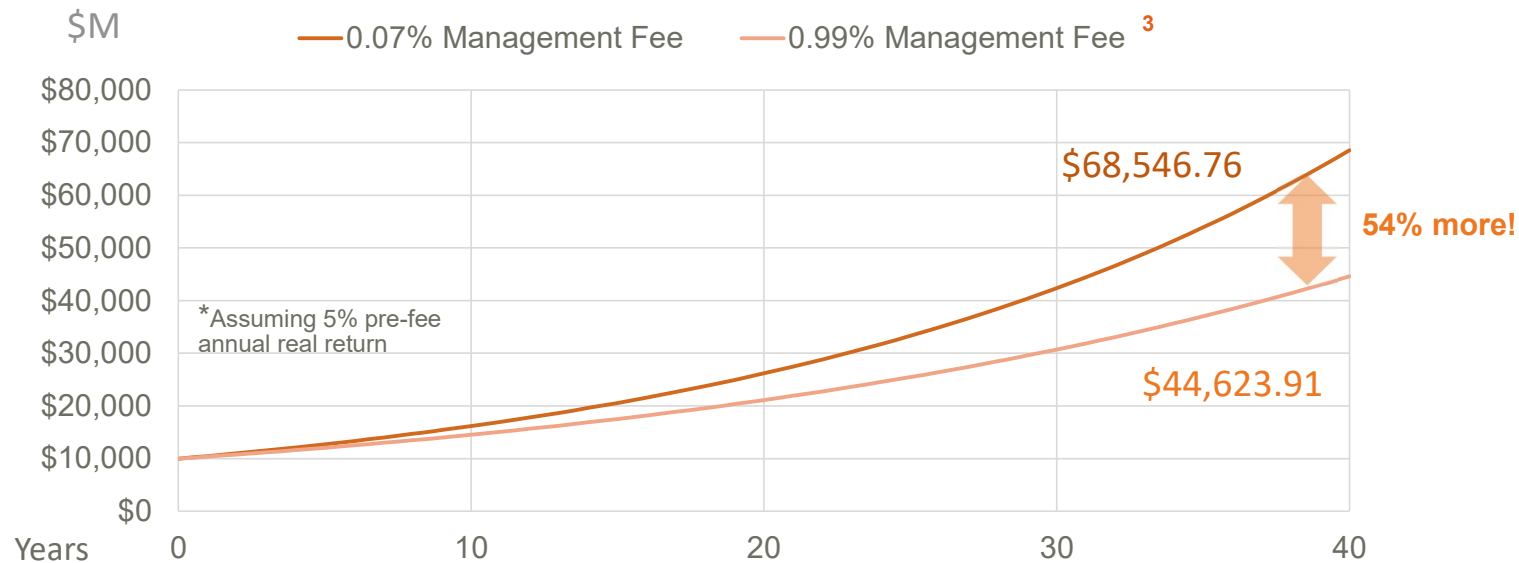
**Investing for life stages –  
looking at the long term**





# Over the long term – fees matter!

## Investment portfolio over time comparison<sup>1,2</sup>



Hypothetical example provided for illustrative purposes only. Actual investment results may differ from assumed results.

1. Other fees and costs may apply, such as transactional costs. 2. Source: Bloomberg. Based on expense ratios of Australian shares ETFs traded in Australia or on overseas exchanges.

3. Source: Morningstar. Average Australian equity active management fee as at 30 April 2022.





# How ETPs may be used in your portfolio

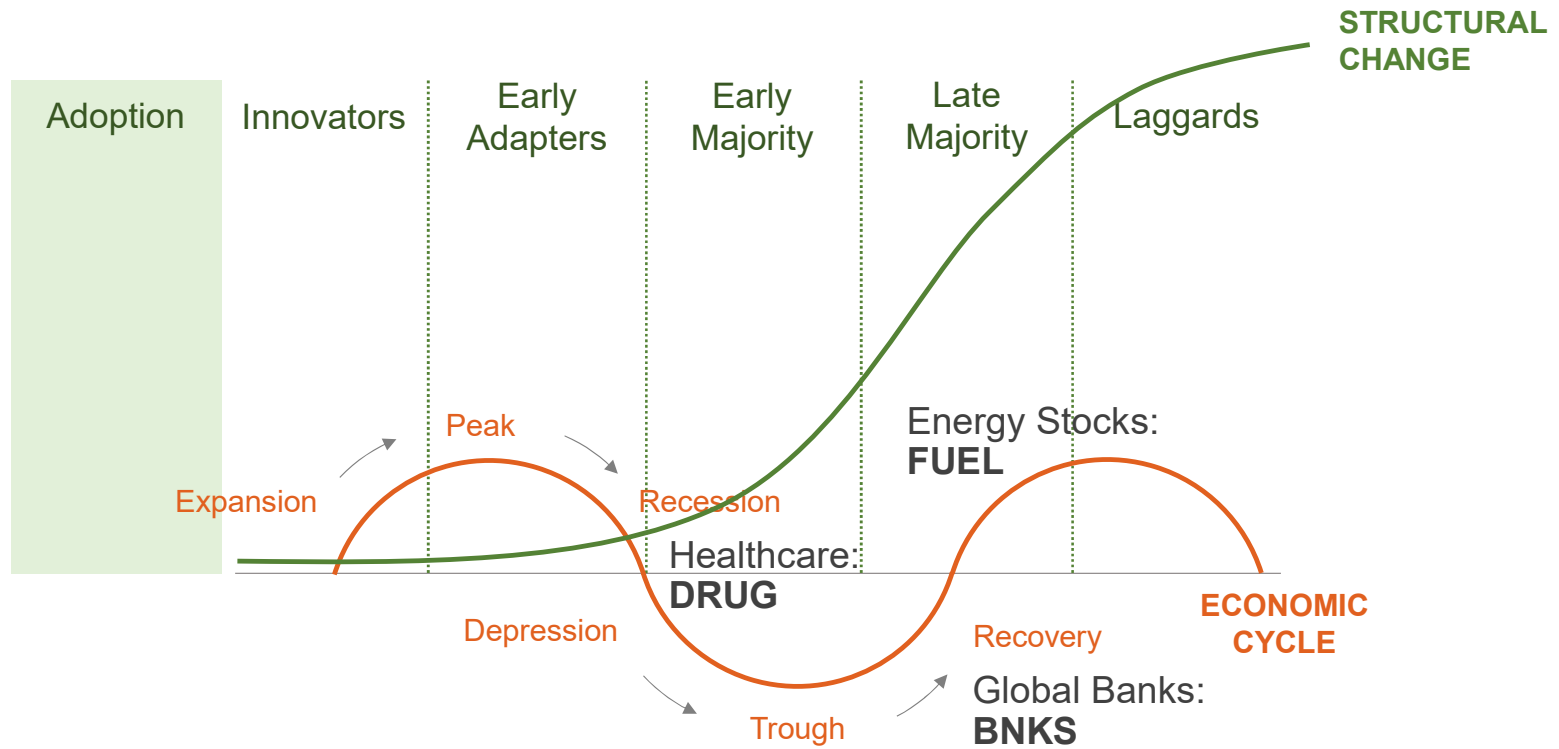
## Core-satellite strategy

Build a large “core” of diversified, broad investments, and then invest in smaller numbers of stocks that interest you as “satellites.”





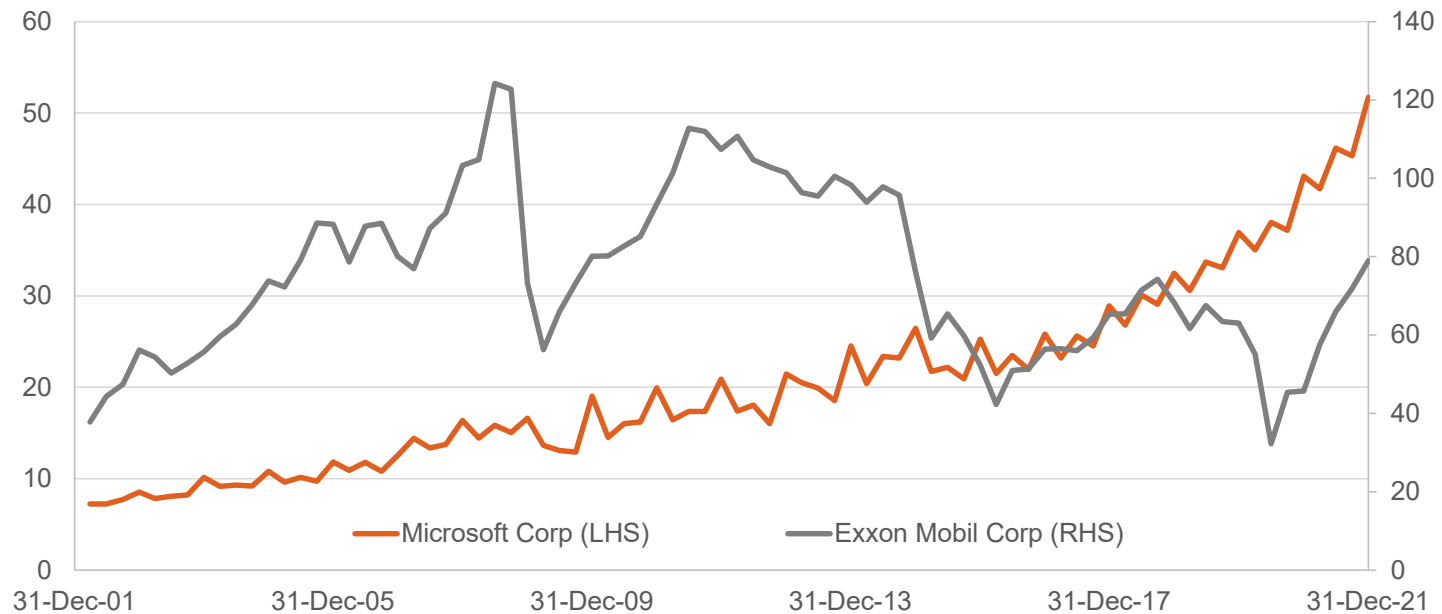
# Structural change – a different approach





# Structural investing – a different approach

## Microsoft vs Exxon Mobil quarterly revenue (US\$ billions) Dec 2001 - Dec 2021



Source: Bloomberg. Past performance is not indicative of future performance.



# Active vs passive – it makes a difference!

## SPIVA (S&P Index vs. Active) findings on active manager performance v benchmark – % of funds that failed to beat the benchmark index

### Report 1a: Percentage of Funds Outperformed by the Index (Based on Absolute Return)

FUND CATEGORY	COMPARISON INDEX	1-YEAR (%)	3-YEAR (%)	5-YEAR (%)	10-YEAR (%)	15-YEAR (%)
Australian Equity General	S&P/ASX 200	42.24	62.65	73.45	79.82	83.74
Australian Equity Mid- and Small-Cap	S&P/ASX Mid-Small	42.36	44.27	58.87	56.48	48.84
International Equity General	S&P Developed Ex-Australia LargeMidCap	80.36	79.64	81.40	92.70	94.44
Australian Bonds	S&P/ASX Australian Fixed Interest 0+ Index	58.46	57.75	69.49	78.57	83.61
Australian Equity A-REIT	S&P/ASX 200 A-REIT	72.13	63.64	64.71	81.48	87.21

Sources: S&P Dow Jones Indices LLC, Morningstar. Data as at 31 December 2021. **Past performance, whether actual or back-tested, is not indicative of future performance.** Table is provided for illustrative purposes and reflects hypothetical historical performance. The S&P/ASX Australian Fixed Interest 0+ Index was launched 5 September 2014. The S&P/ASX Mid-Small was launched 15 August 2011. All information prior to an index's launch date is back-tested (not actual), using the methodology in effect on the index launch date. Please note there are inherent limitations with back-tested performance.



# Using ETFs in your portfolio





# What is a diversified ETF?

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Designed to provide exposure to a portfolio of securities that are:



Low cost



Diversified  
“all-in-one”  
portfolio



Strategic  
asset allocation



Traditional  
growth asset  
allocation



Accessible  
in one trade

A low-cost diversified ETF may be well suited to investors who desire a portfolio that provides exposure to a range of asset classes via a single investment option, at a lower cost than traditional diversified funds.

# BetaShares All Growth Diversified ETF Investment strategy



DHHF's passively blended portfolio is:

**100% allocated to growth assets**

(international and Australian shares across large, mid and small capitalisation companies)



- ▶ DHHF uses an open approach in its construction, aiming to ensure continued cost-effectiveness and that the most optimal underlying investment tools are being used to construct the portfolio.
- ▶ To that end, DHHF obtains its exposure using ETFs from both BetaShares and other leading ETF managers, and includes ETFs that trade in Australia, as well as on overseas exchanges.
- ▶ Underlying exposures are reviewed regularly by the BetaShares Investment Committee and adjusted periodically to ensure they remain consistent with DHHF's objectives.

# Diversified ETFs – who might the funds suit?



## **Ethical Diversified Balanced ETF (ASX: DBBF)**

- ▶ Investment timeframe of at least 5 years
- ▶ Medium tolerance for risk: willing to accept some volatility in their portfolio in order to achieve their long-term objective



## **Ethical Diversified Growth ETF (ASX: DGGF)**

- ▶ Investment timeframe of at least 7 years
- ▶ Medium to high risk tolerance: willing to accept a medium to high degree of volatility in their portfolio in order to achieve their long-term objective.



## **Ethical Diversified High Growth ETF (ASX: DZZF)**

- ▶ Investment timeframe of at least 7 years
- ▶ High tolerance for risk: willing to accept a high degree of volatility in their portfolio in order to achieve their long-term objective.



## **Diversified All Growth ETF (ASX: DHHF)**

- ▶ Investment timeframe of at least 7 years
- ▶ Very high tolerance for risk: willing to accept a high to very high degree of volatility in their portfolio in order to achieve their long-term objective.



# BetaShares Global Quality Leaders ETF | ASX: QLTY



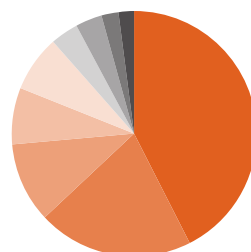
## Investment objective

The Fund seeks to provide investors with exposure to a diversified portfolio of quality global companies (ex-Australia), with high profitability, low leverage and sustainable cash flows.

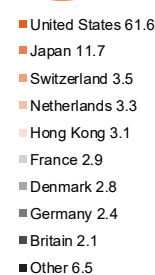
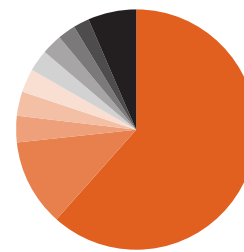
## Key Information

<b>ASX Code</b>	QLTY
<b>Bloomberg Code</b>	QLTY AU
<b>IRESS Code</b>	QLTY.AXW
<b># of holdings</b>	149*
<b>Asset backing</b>	Equities
<b>Management Fee</b>	0.29% p.a.
<b>Expense recoveries</b>	Capped at 0.06% p.a.
<b>Inception Date</b>	November 2018

## Sector Allocation (%) As at 30 April 2022



## Country Allocation (%) As at 30 April 2022



## Top 10 Exposures As at 30 April 2022

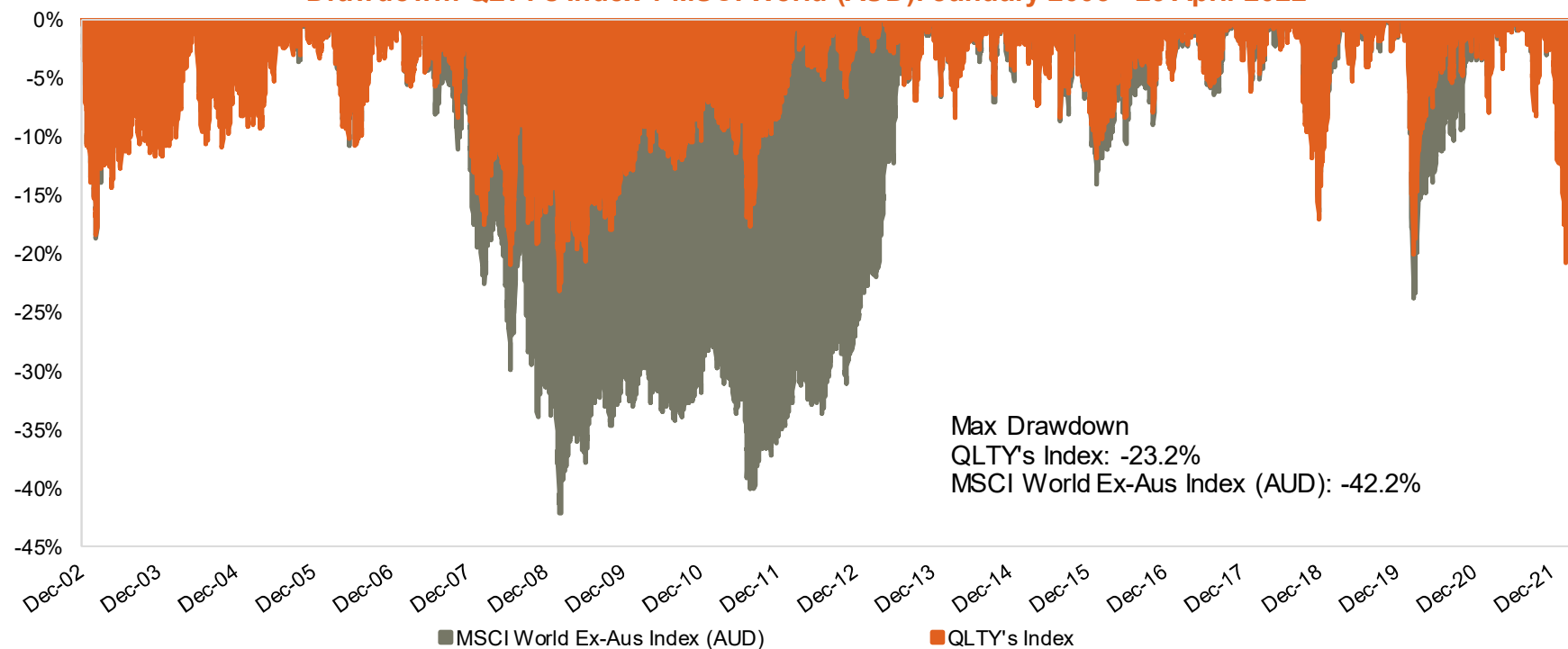
<b>Company</b>	<b>Weighting</b>
Visa Inc	2.3%
Johnson & Johnson	2.2%
UnitedHealth Group	2.2%
Facebook Inc	2.1%
Novo Nordisk	2.1%
AIA Group	2.1%
Pfizer Inc	2.1%
Texas Instruments Inc	2.1%
Microsoft Corp	2.1%
Accenture PLC	2.1%

\*Between index rebalance dates the index components may differ from 150 due to corporate events.

# QLTY's Index historically has displayed defensive characteristics during market declines



Drawdown: QLTY's Index v MSCI World (AUD): January 2003 - 29 April 2022

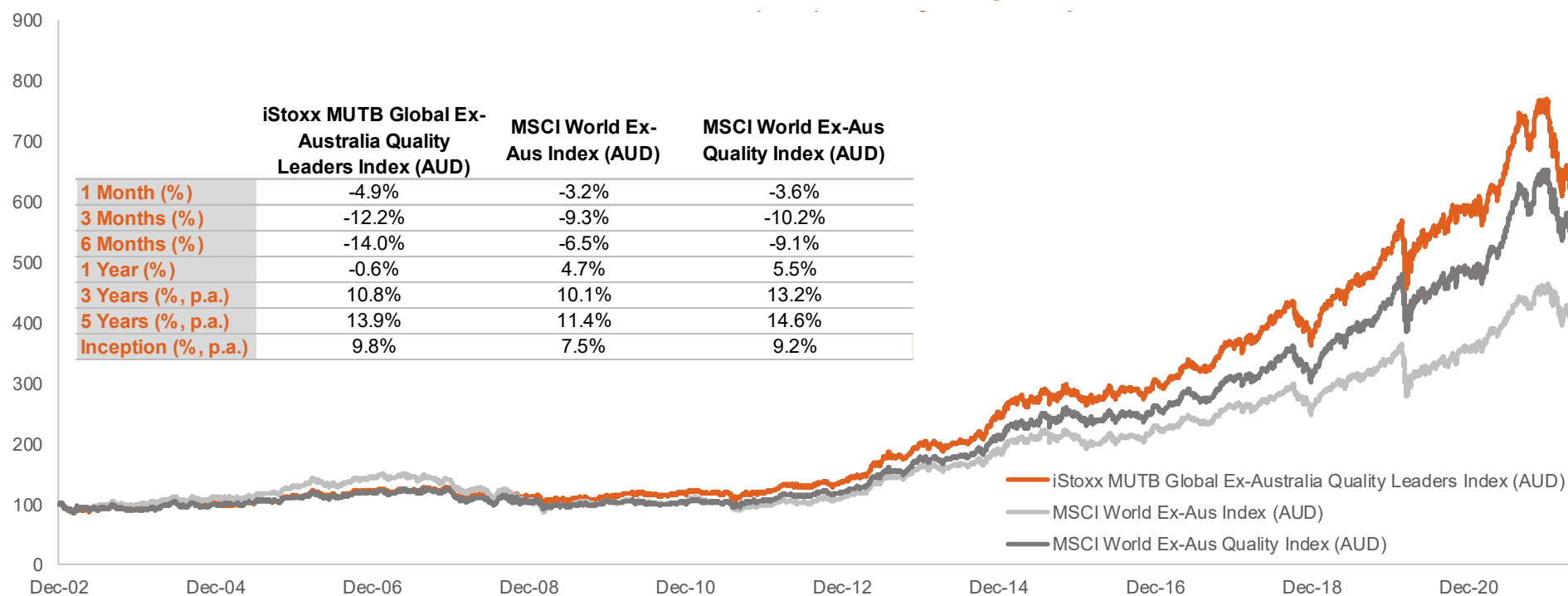


Graph shows performance of iStoxx Global Ex-Australia Quality Leaders Index v MSCI World Index. Index performance does not take into account ETF fees and costs. You cannot invest directly in an index. **Past performance is not an indicator of future performance of any index or ETF.**

# QLTY's Index has outperformed MSCI World & MSCI World Quality Index over the longer term



## QLTY's Index v MSCI World (AUD): January 2003 – 30 April 2022



Source: Bloomberg. Graphs show performance of iStoxx Global Ex-Australia Quality Leaders Index v MSCI World Ex Aus Index v MSCI World Ex Aus Quality Index. Index performance does not take into account ETF fees and costs. You cannot invest directly in an index. **Past performance is not an indicator of future performance of any index or ETF. Inception date 30 December 2002.**



# BetaShares Australia 200 ETF | ASX: A200

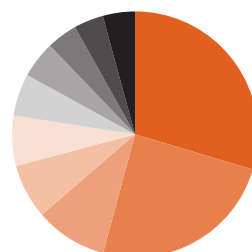
## Investment objective

The Fund aims to track the performance of an index (before fees and expenses) that provides exposure to the largest 200 companies listed on the ASX, based on their market capitalisation.

## Key Information

ASX Code	A200
Index Name	Solactive Australia 200 Index
Index ASX Code	N/A
Bloomberg Code	A200 AU
# of components	200*
Asset backing	Equities
Management Fee	0.07% p.a
ETF Inception Date	7 May 2018

## Sector Allocation (%) As at 30 April 2022



■ Financials	29.6
■ Materials	24.6
■ Healthcare	9.5
■ Real Estate	7.2
■ Consumer Discretionary	6.6
■ Industrials	5.6
■ Consumer Staples	4.8
■ Energy	4.0
■ Communication Services	3.9
■ Other	4.2

## Top 10 Exposures As at 30 April 2022

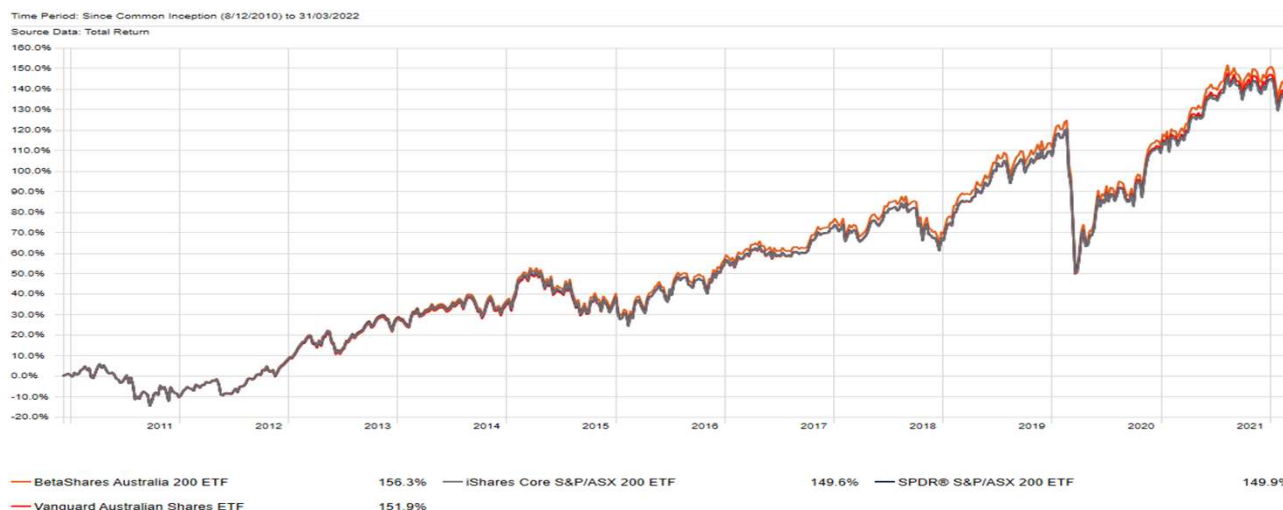
Company	Weighting
<b>BHP</b>	10.9%
<b>Commonwealth Bank</b>	8.2%
<b>CSL</b>	6.1%
<b>National Australia Bank</b>	4.9%
<b>Westpac Bank</b>	3.9%
<b>ANZ Bank</b>	3.6%
<b>Macquarie Group</b>	3.5%
<b>Wesfarmers</b>	2.6%
<b>Telstra Corp</b>	2.2%
<b>Woolworths Group</b>	2.2%

\*Between annual rebalance dates the index components may differ from 200 due to corporate events.

# Historical ETF performance\* (net of management fees)



- ▶ A200's management fee is 7bps vs. IOZ's 9bps, STW's 13bps, whilst VAS' is 10bps.
- ▶ Historically, A200 (in orange) has given a higher long term (10-year) return with less fee drag versus IOZ (grey), STW (blue) and VAS (red)\*\*.



## Key Fund Information

	Ticker	Inception date	Management fee
BetaShares Australia 200 ETF	A200	07/05/2018	0.07% p.a.
iShares Core S&P/ASX 200 ETF	IOZ	06/12/2010	0.09% p.a.
SPDR S&P/ASX 200 ETF	STW	24/08/2001	0.13% p.a.
Vanguard Australian Shares ETF	VAS	04/05/2009	0.10% p.a.

## Historical Returns

As at date: 31/03/2022 Currency: Australian Dollar Source data: Total return

	1M	3M	6M	1Y	3Y (p.a.)	5Y (p.a.)	10Y (p.a.)	Common Inception (01/01/2011) (p.a.)
BetaShares Australia 200 ETF	6.82	2.36	4.71	15.49	10.78	9.30	10.14	8.66
iShares Core S&P/ASX 200 ETF	6.87	2.22	4.32	14.84	10.48	9.08	9.89	8.42
SPDR S&P/ASX 200 ETF	6.84	2.20	4.32	14.89	10.54	9.10	9.92	8.44
Vanguard Australian Shares ETF	6.87	2.05	4.34	15.28	10.87	9.34	10.00	8.50

Source: Morningstar Direct. \*Performance shown for A200 prior to fund inception is the Solactive Australia 200 Index net of A200's 0.07% p.a. management fee. \*\*Other costs, such as transaction costs, may apply. You cannot invest directly in an index. Past performance is not indicative of future performance of any index or ETF.

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# BetaShares Thematic Funds

## ASX: RBTZ

Global Robotics & A.I.



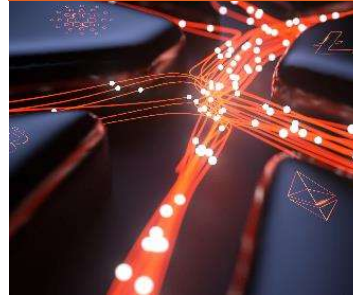
## ASX: CLDD

Cloud Computing



## ASX: CRYP

Crypto Innovators



## ASX: IPAY

Future of Payments



## ASX: GAME

Video Game & Esports



## ASX: HACK

Global Cybersecurity



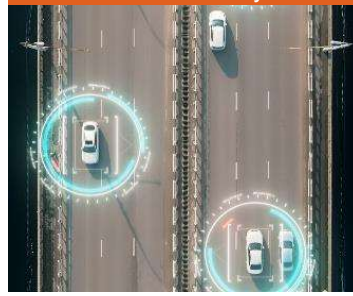
## ASX: EARTH

Climate Change Innovation



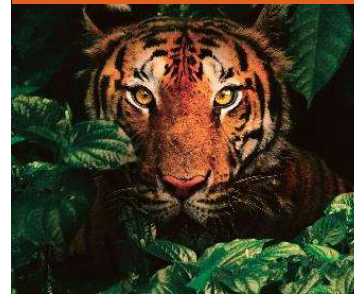
## ASX: DRIV

Electric Vehicles and Future Mobility



## ASX: ASIA

Asia Technology Tigers



## ASX: IBUY

Online Retail E-Commerce



# BetaShares Electric Vehicles and Future Mobility ETF



## ASX: DRIV

### Investment objective

Aims to track the performance of an index (before fees and expenses) of global companies at the forefront of innovation in automotive technology.

### Key facts

Index: Solactive Future Mobility Index

Number of constituents: 50

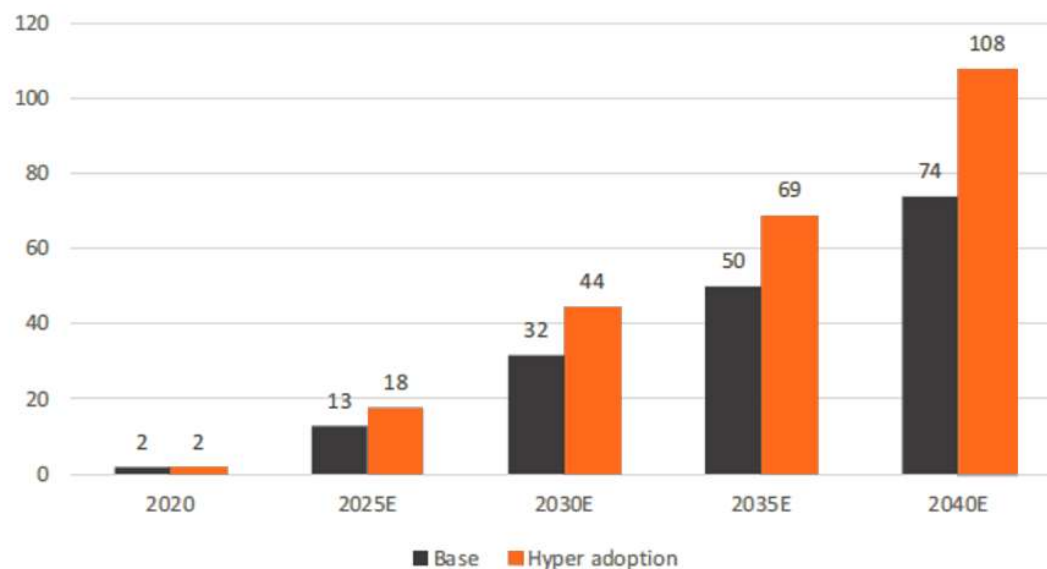
Date of inception: 13 Dec 2021

Management cost: 0.67% p.a.\*

\* Other costs apply, such as transaction costs, may apply. See PDS for more information.

### Global EV sales forecasts<sup>1</sup>

Goldman Sachs base case vs hyper adoption scenarios (million units)



1. Source: IHS Global Insight, Goldman Sachs Global Investment Research, July 2021. Actual outcomes may differ materially from projected outcomes.

# BetaShares Global Cybersecurity ETF

## ASX: HACK



### Investment objective

Aims to track the performance of an index (before fees and expenses) that provides exposure to leading companies in the global cybersecurity sector.

### Key facts

Index: Nasdaq CTA Cybersecurity Index

Number of constituents: 41

Date of Inception: 30 August 2016

Management cost: 0.67% p.a.\*

### Growing threat of cyberattack means cybersecurity is a necessity



#### Digital economy

Shift to online has increased vulnerability to attack



#### US\$4.24 million

Global average total cost of a data breach to an organisation<sup>1</sup>



#### Russia

Responsible for an estimated 58% of state sponsored cyberattacks<sup>1</sup>

\* Other costs apply, such as transaction costs, may apply. See PDS for more information.

1. Sources: Microsoft, Oct 2021. IBM Security Cost of Data Breach Report 2021



# BetaShares Climate Change Innovation ETF

## ASX: ERTH



### Investment objective

Aims to track the performance of an index (before fees and expenses) of up to 100 leading global companies whose products and services are helping to decarbonise the global economy.

### Key facts

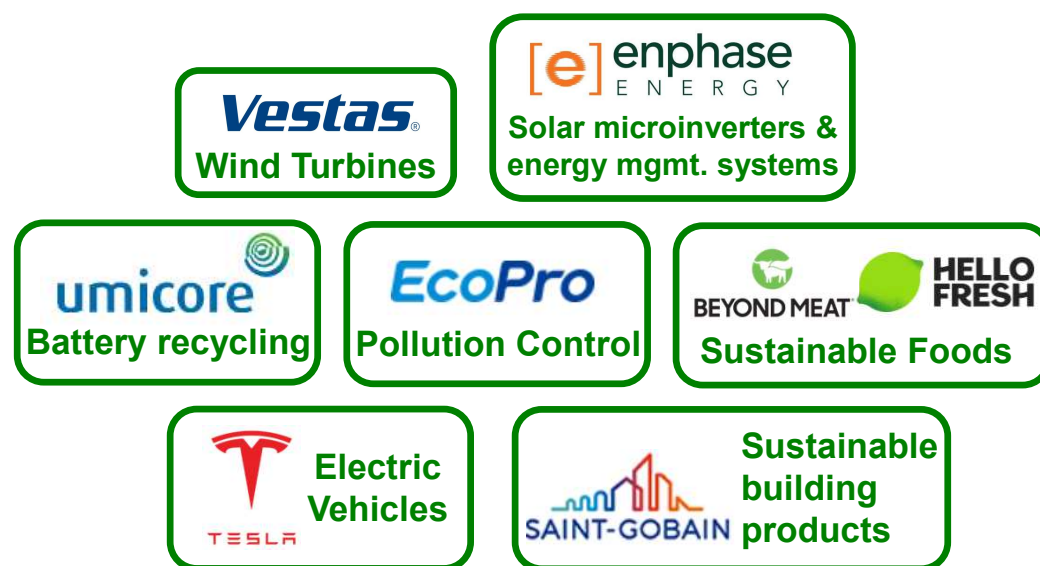
Index: Solactive Climate Change and Environmental Opportunities Index

Number of constituents: 98

Date of Inception: 9 March 2021

Management cost: 0.65% p.a.\*

### Examples of companies in the index<sup>1</sup>



\* Other costs apply, such as transaction costs, may apply. See PDS for more information.

1. As at 9 May 2022. No assurance is given that these companies will remain in the Fund's portfolio or will be profitable investments.



# FOOD: Reflationary exposure with geo-political tailwind

**FOOD\* provides exposure to a index of leading global agricultural companies:**

Historically strong relationship between of FOOD's Index and inflation expectations

War in Ukraine is placing further upward pressure on soft commodity prices. Ukraine and Russia traditionally account for ~25% of global grain exports

## FOOD vs U.S. 10-year inflation expectations March 2017 - March 2022



\*FOOD is the ASX code for BetaShares Global Agriculture Companies ETF - Currency Hedged

Source: Bloomberg. Past performance is not an indicator of future performance of any index or ETF. You can not invest directly in an index



# Blending thematic satellites with low-cost core

## Performance and correlations: 30 April 2019 – 30 April 2022

	Total Return (p.a.)	Volatility	ERTH Index	HACK Index	DRIV Index	MSCI ACWI	A200 Index	OZBD Index
ERTH Index	22.1%	23.3%	1					
HACK Index	18.5%	18.5%	0.61	1				
DRIV Index	17.4%	28.3%	0.90	0.55	1			
MSCI ACWI	10.1%	12.0%	0.62	0.63	0.72	1		
A200 Index	9.8%	17.7%	0.50	0.48	0.60	0.71	1	
OZBD Index	-1.2%	6.0%	0.26	0.23	0.19	0.32	0.09	1

Source: Bloomberg. As at 30 April 2022. Calculations of Volatility and Correlations are based on AUD monthly returns. Provided for illustrative purposes only and not a recommendation to invest or adopt any investment strategy. Full index names are included on the following page. Index performance does not take into account ETF fees and costs. You cannot invest directly in an index. **Past performance is not an indicator of future performance of any index or ETF.**



# Blending thematic satellites with low-cost core

## Blended portfolio outcomes : 30 April 2019 – 30 April 2022

Portfolio	ERTH Index	HACK Index	DRIV Index	MSCI ACWI	A200 Index	OZBD Index	Total Return (p.a.)	Volatility	Sharpe Ratio
A	0%	0%	0%	45%	45%	10%	9.1%	12.5%	0.70
B	2%	2%	2%	42%	42%	10%	9.7%	12.6%	0.74
C	4%	4%	4%	39%	39%	10%	10.3%	12.8%	0.78

Hypothetical example provided for illustrative purposes only. Not a recommendation to invest or adopt any investment strategy.

Source: Bloomberg. As at 30 April 2022. Calculation of volatility data is based on AUD monthly returns. Portfolio A, B and C returns assume monthly rebalancing to allocations shown above. For the calculation of the Sharpe Ratios an average risk-free rate of 0.33% was used. Index performance does not take into account ETF fees and costs. You cannot invest directly in an index. **Past performance is not an indicator of future performance of any index or ETF.**

ERTH's Index is the Solactive Climate Change and Environmental Opportunities Index, HACK's Index is the Nasdaq CTA Cybersecurity Index, DRIV's Index is the Solactive Future Mobility Index, MSCI ACWI is the MSCI All Country World Index, A200's Index is the Solactive Australia 200 Index and OZBD's Index is the Bloomberg Australian Enhanced Yield Composite Bond Index.



# Things to consider

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▶ **Investment risk:**

- ▶ Fixed income ETF risks may include for example market risk, interest rate risk, credit risk and index tracking risk.
- ▶ Thematic ETF returns can be expected to be more volatile (i.e. vary up and down) than a broad global shares exposure, given their concentrated exposure. A thematic ETF should only be considered as a component of a diversified portfolio.

**Risks may include for example:**

- **Market risk**
  - **Index methodology risk**
  - **Country risk**
  - **Currency risk**
- ▶ **No guarantees:** Future outcomes are uncertain – desired return outcome may not be achieved.
- ▶ **General information only:** Today's discussion does not take into account any person's individual circumstances and is not personal financial advice.
- ▶ **Research:** See relevant PDS for more information about risks and other features of each fund.
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# Questions?

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