

PORTFOLIO FACTS

Investment Goal	Income
Market	ASX
Standard Risk Measure	High
Rebalance Frequency	Discretionary
Time Horizon	Mutli-year
Minimum Suggested Investment	\$2000 per stock* *\$5000 per stock is modelled

PREMIUM MEMBERSHIP INCLUDED

- Access to the Membership Portal which contains investment resources, portfolios and strategies to invest as the Rivkin team do.
- Timely email and SMS notifications to rebalance the portfolios you are following.
- Invitations to exclusive webinars and events on a range of topics.
- Invitations to invest in exclusive offers only available to Rivkin members.
- Exclusive access to Shannon Rivkin and the Rivkin investment team through weekly updates and Virtually Live where you can ask specific questions on the stock market.

PORTFOLIO STRATEGY

The ASX Income portfolio invests in listed ASX hybrid securities. The investment premise is to identify the highest yielding hybrids in the investment universe and hold them long term to collect the regular income stream that comes with these securities. The benefit of this portfolio is that the capital value of the portfolio is less volatile than a typical portfolio of common stocks.

CURRENT PORTFOLIO

ASX INCOME			
STOCK NAME	CODE	DIVIDENDS	RETURN PERCENTAGE
#1 ANZ Bank Hybrids	ANZPG	15.33%	5.91%
#2 Challenger Capital Notes	CGFPB	9.89%	8.68%
#3 Crown Hybrids	CWNHB	8.42%	30.92%
#4 IAG Captial Notes	IAGPD	5.85%	0.4%
#5 Macquarie Capital Notes	MQGPD	5.81%	4.31%
#6 NAB Hybrids	NABPD	5.51%	2.96%
#7 Suncorp Hybrids	SUNPH	5.34%	2.95%

#In alphabetical order. Holdings will change from month to month.

RIVKIN INVESTMENT EXPERTISE

Rivkin has 5 decades of expertise in stock markets and has been guiding Australian investors for over 23 years. Rivkin is proud of our values of family, honesty, transparency, respect and simplicity. When you invest with Rivkin you have access to our actively managed model portfolios which are designed and maintained by our experienced team of experts. The Investment team has the combined experience of over 120 years, and the current team has on average 17 years of industry experience each to pick you the best stocks on a risk adjusted basis.

Contact Us :

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PERFORMANCE **

	ASX Income %
Since Inception	1.38
Rolling 12 months	4.26

**Past performance is not a reliable indicator of future performance. The value of your investment may rise and fall, and you may not be returned the amount originally invested.

Complex product warning: This document contains information about hybrids, which are considered complex products. Complex products carry significant risks and are not suitable for all investors. We recommend seeking professional advice to ensure trading or investing in such products is appropriate for you. Please refer to our website or request the PDS to understand the full risks and cost of the product before taking the decision to invest in it.