

Leveraged Direct Investment Loan Changes

Approved Shares



Effective From 1/05/2025

Previous Lending Ratios

New Lending Ratios

Security Code	Security Name	Standard	Diversified	Concentration	Standard	Diversified	Concentration
AN3PH	Australia and New Zealand Banking Group Limited Cap Note 3-Bbsw+3.80% Perp Nc Red T03-25	70%	75%	0%	0%	0%	0.5
AOF	Australian Unity Office Fund	0%	50%	0%	0%	0%	0.2
CBAPG	Commonwealth Bank of Australia Cap Note 3-Bbsw+3.40% Perp Non-Cum Red T-04-25	70%	75%	0%	0%	0%	0.5
CCP	Credit Corp Group Limited	40%	50%	0.2	0%	50%	0.2
DEG	De Grey Mining Limited	0%	40%	0%	0%	0%	0.2
DN1	Dominion Income Trust 1	0%	0%	0%	0%	40%	15%
DNL	Dyno Nobel Limited	0%	0%	0%	60%	65%	60%
GRR	Grange Resources Limited	0%	40%	0%	0%	0%	0.2
IPL	Incitec Pivot Limited	60%	65%	0%	0%	0%	0.6
JLG	Johns Lyng Group Limited	0%	50%	30%	0%	50%	20%
LSF	L1 Long Short Fund Limited	0%	50%	20%	0%	50%	50%
LTM	Arcadium Lithium PLC	0%	50%	0%	0%	0%	0.3
MIN	Mineral Resources Limited	0%	60%	30%	0%	60%	15%
NWH	NRW Holdings Limited	40%	50%	0.2	0%	50%	0.2
SGF	SG Fleet Group Limited	0%	45%	0%	0%	0%	0.2
TRJ	Trajan Group Holdings Limited	0%	40%	0%	0%	0%	0.2
WGX	Westgold Resources Limited	40%	50%	0.2	0%	50%	0.2

Please contact the Customer Service Team on 1300 307 807 (+61 2 8282 8282) 8.30am – 5.30pm AEST/AEDT for further details.

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Leveraged Direct Investment Loan Changes

Exchange Traded Products



Effective From 1/05/2025

Previous Lending Ratios

New Lending Ratios

Security Code	Security Name	Standard	Diversified	Concentration	Standard	Diversified	Concentration
EMXC	iShares MSCI Emerging Markets Ex China ETF	0%	0%	0%	0%	65%	30%
GLIN	iShares Ftse Gbl Infrastructure (Aud Hedged) ETF	0%	0%	0%	0%	65%	30%
GLPR	iShares Ftse Gbl Property Ex Aus (Aud Hedged) ETF	0%	0%	0%	0%	65%	30%
IHHY	iShares Global High Yield Bond (Aud Hedged) ETF	0%	0%	0%	60%	70%	50%
JEPI	Jpmorgan Eq Prem Income Active ETF (Managed Fund)	0%	0%	0%	0%	60%	50%
JPEQ	Jpm Us100Q Eq Prem Inc Active ETF (Managed Fund)	0%	0%	0%	0%	60%	50%
LEND	VanEck Gbl Listed Private Credit (Aud Hedged) ETF	0%	0%	0%	0%	50%	30%

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Leveraged Direct Investment Loan Changes

Separately Managed Accounts - Line by line LVR



Effective From		Previous Lending Ratios			New Lending Ratios		
Security Code	Security Name	Standard	Diversified	Concentration	Standard	Diversified	Concentration
HUB24 Services Pty Ltd							
	Choice Menu - All investments are 'line by line'			0%			0%
	Core Menu - All investments are 'line by line'			0%			0%
Netwealth							
	Netwealth Wrap Service			0%			0%
Praemium Customised Portfolio Service							
	All investments are 'line by line'			0%			0%

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Leveraged Direct Investment Loan Changes

Wraps/Master Trusts/Platforms



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Security Code	Security Name	Standard	Diversified	Concentration	Standard	Diversified	Concentration
AMP Capital Investors Ltd							
	Generations Investment Portfolio			0%			0%
	iAccess			0%			0%
	North			0%			0%
	Summit Money Master			0%			0%
	Summit Money Master Portfolio Service for Invests			0%			0%
Asgard							
	Mercer Portfolio Service			0%			0%
	PortfolioCare Elements			0%			0%
	PortfolioCare Master Fund			0%			0%
Beacon							
	Beacon Managed Funds & Share Service			0%			0%
	Beacon Managed Profiles & SMA - Funds			0%			0%
Colonial First State Investments Limited							
	Colonial First State Edge			0%			0%
	Colonial First State FirstChoice			0%			0%
	Colonial First State FirstWrap (Avanteos)			0%			0%
Equity Trustees Ltd							
	Freedom of Choice Portfolio Service			0%			0%
HUB24 Services Pty Ltd							
	Privilege Investment Solution IDPS			0%			0%
IOOF Investment Services Ltd							
	Expand Essential Investment			0%			0%
	Expand Extra Investment			0%			0%
	Rythym Investment IDPS			0%			0%
	Shadforth Portfolio Service Investment			0%			0%
JBWere Ltd							
	JBWere Multi-Asset			0%			0%
Macquarie Investment Management Ltd							
	Macquarie Private Portfolio Management (MPPM)			0%			0%
	Macquarie Vision			0%			0%
	Macquarie Wrap - Macquarie Invest Accumulator (MIA)			0%			0%
	Macquarie Wrap - Macquarie Invests Manager (MIM)			0%			0%
	Managed Portfolio Service (MPS)			0%			0%
MLC Investments Ltd							
	MLC MK Inv Service			0%			0%
	MLC MK Inv Service Fundamentals			0%			0%
Navigato Australia Ltd							
	Access Invest		50%	0%		50%	0%
	DPM Invest Service			0%			0%
	FC One Invest Builder			0%			0%
	My Blueprint Invest Plan			0%			0%

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Navigator Australia Ltd							
	Navigator Personal Invest Plan			0%			0%
	Navigator PremiumChoice Invest Service			0%			0%
	Portfoliofocus - Premium Invest Service			0%			0%
	St Andrews Invest Plan			0%			0%
Netwealth							
	Netwealth Wrap Service			0%			0%
North (AMP)							
	MyNorth Investment IDPS			0%			0%
Oasis							
	Aspire Invest Service			0%			0%
	Avenue Portfolio Services			0%			0%
	Compass Invest Service			0%			0%
	Dominion Portfolio Services			0%			0%
	FSP Prestige Plus			0%			0%
	Imagine Wealth Invest Services			0%			0%
	Make a Choice Invest Services			0%			0%
	Matrix Portfolio Services			0%			0%
	Mentor Portfolio Services			0%			0%
	Portfolio Focus Invest Services			0%			0%
	QWealth Invest Services			0%			0%
	Strategy Portfolio Services			0%			0%
	Voyage Invest Service			0%			0%
	Wealthtrac Portfolio Services			0%			0%
OneVue							
	Accountable			0%			0%
	ALTUS Exchange			0%			0%
	Brightday			0%			0%
	OneVue			0%			0%
	OneVue Private (previous Direct Portfolio)			0%			0%
	PUMA			0%			0%
	Super Prophets			0%			0%
	UMA Select			0%			0%
	Wealth Pathway			0%			0%
	Wealth Portal			0%			0%
Ord Minnett Man. Ltd							
	Ord Prime Portfolio			0%			0%
Perpetual Investment Management Ltd							
	Perpetual Wealth Focus			0%			0%
Powerwrap							
	Powerwrap			0%			0%
The Trust Company (RE Services)							
	Xplore Managed Account			0%			0%

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