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## **Email to Raiz Invest customers from George Lucas, Managing Director/CEO**

We enter 2021 with a spring in our step, confident in building on the gains of 2020. Whether it's new products or growth in Active Customers and Funds Under Management (FUM), all the signs are positive.

Soon we will roll out our Custom Portfolio offering in Australia, allowing those users who decide it is suitable for them to be able to personalise a portfolio by selecting their own asset weights.

The \$730 billion self-managed super fund (SMSF) sector is also in our sights, with the aim being for these funds to invest in any of our Raiz investment portfolios in this quarter. We believe this is an exciting opportunity for SMSFs as Raiz only charges a platform fee that includes all brokerage for unlimited trades and automatic rebalancing.

There are other initiatives in the pipeline, as you would expect from us, and we will be making announcements throughout the year as they are released.

These exciting developments are made possible by our growth in Active Customers and FUM as demonstrated by the three-month figures to 31 December 2020. Over this period Active Customers grew by more than 19 per cent.

A major milestone achieved in 2020 was the passing of \$500 million in FUM in September. Although we reached this milestone in a year when economic activity was sharply curtailed due to COVID, it is the growth we have enjoyed since then that is truly exciting. Based on the growth numbers of the past three months, \$1 billion in FUM by the end of 2021 is a realistic goal.

Raiz began offering investors an exposure to Bitcoin during 2020 with the launch of our seventh investment portfolio called Sapphire. Our customer feedback had shown there was a growing appetite for exposure to an alternative asset class of cryptocurrency in a portfolio option. Clearly it is not an asset for everyone, but for those who opted for the Sapphire portfolio they have enjoyed a Bitcoin rally of more than 140% in the last quarter of the 2020 calendar year.

This time last year COVID was a little-known virus. Two months later, countries around the world were in lockdown. Despite the economic trauma caused globally, we continued to grow in 2020, made possible by having a committed and hardworking team globally that quickly adjusted to COVID, cutting costs, and most importantly, never losing sight of our core business philosophy of always putting the customer first.



Hopefully 2021 will usher in greater economic growth, public health and social stability across the world as various vaccines are rolled out. We certainly hope so.

In the meantime, I thank you for your support and contributing to our success and, please, keep safe.

Yours sincerely,

**George Lucas**  
**Managing Director /CEO**  
**Raiz Invest Limited**

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