



Raiz Invest Limited  
ABN 74 615 510 177  
Level 11, 2 Bulletin Place  
Sydney NSW 2000  
T 1300 754 748  
www.raizinvest.com.au

ASX Release

3 February 2021

## Raiz Invest Limited (RZI): January 2021 - Key Metrics

Raiz Invest Limited (**Raiz** or **the Company**) Australian, Indonesian, and Malaysian Active Customers and Australian total Funds under Management (FUM) update for the month to 31 January 2021<sup>1</sup>.

### Commentary

Raiz Invest MD/Global CEO George Lucas says: “Funds under management (FUM) and Active Customers both showed solid gains in January. Total FUM in Australia enjoyed a 5.5% growth spurt to \$639.08 million.

“Active customer growth picked up the pace in January, increasing 9.5% to 376,198, driven by an increase in Active Customers in Australia.

“Custom Portfolio, which gives Australian customers greater choice to select their own asset weightings, was successfully launched in late January. The uptake has been very encouraging with more than 3,200 clients representing more than \$14 million in FUM using this option. The average balance in a Custom Portfolio is \$4,273, significantly higher than the average balance of \$2,224 across the entire customer base.”

### Global Active Customers

	31 Jan 2021	31 Dec 2020	1 Month % change	3 Month % change	12 Month % change
Customer Sign Ups	1,416,054	1,325,311	+6.8%	+19.9%	+73.6%
Investment Accounts	673,980	620,367	+8.6%	+22.6%	+79.3%
<b>Active Customers</b>	<b>376,198</b>	<b>343,573</b>	<b>+9.5%</b>	<b>+25.9%</b>	<b>+72.1%</b>



### Australia - Active Customers and Funds Under Management (FUM)

AUD	31 Jan 2021	31 Dec 2020	1 Month % change	3 Month % change	12 Month % change
Customer Sign Ups	995,676	959,028	+3.8%	+6.8%	+22.1%
Investment Accounts	467,971	444,422	+5.3%	+9.1%	+24.5%
<b>Active Customers</b>	<b>250,906</b>	<b>237,229</b>	<b>+5.8%</b>	<b>+9.2%</b>	<b>+14.8%</b>
Retail	\$554.33m	\$524.57m	+5.7%	+22.4%	+35.1%
Superannuation	\$84.75m	\$81.02m	+4.6%	+16.3%	+19.0%
<b>Total FUM</b>	<b>\$639.08m</b>	<b>\$605.59m</b>	<b>+5.5%</b>	<b>+21.6%</b>	<b>+32.7%</b>

### Southeast Asia - Active Customers

	31 Jan 2021	31 Dec 2020	1 Month % change	3 Month % change
<b>Indonesia</b>				
Customer Sign Ups	232,378	203,470	14.2%	49.9%
Investment Accounts	150,866	131,127	15.1%	57.5%
<b>Active Customers</b>	<b>79,042</b>	<b>68,377</b>	<b>15.6%</b>	<b>63.1%</b>
<b>Malaysia</b>				
Customer Sign Ups	188,000	162,813	15.5%	101.2%
Investment Accounts	55,143	44,818	23.0%	122.5%
<b>Active Customers</b>	<b>46,250</b>	<b>37,967</b>	<b>21.8%</b>	<b>124.4%</b>

- ENDS -

#### Market Announcement authorised by:

George Lucas  
MD /Group CEO  
Raiz Invest Limited

#### Investor and Media Enquiries:

Brendan Malone  
[ir@raizinvest.com.au](mailto:ir@raizinvest.com.au)



## About Raiz

Raiz Invest Limited (ASX: RZI) is Australia's largest, mobile-first financial services platform designed to boost investing and savings in and outside of superannuation, available via the Raiz app or its website.

To gain greater insight to the Raiz business and our strategy, watch our short video by visiting <https://raizinvest.com.au/investors/>

Since launching in 2016 Raiz has achieved solid growth, amassing more than 1.45 million downloads, over 1,400,000 signups, with over 375,000 active monthly customers and over \$639 million funds under management as at 31 January 2021.

Raiz was awarded Australia's Investment Innovator of the Year at the 2017, 2018 and Investment Platform Innovator of the Year 2019 FinTech Business Awards, won the 2018 Australian FinTech Award for FinTech Innovation in Wealth Management (Robo-Advice) and won Best Fintech Superannuation Service/Platform at the 2020 FinTech Awards. Raiz Invest Super was also a finalist in the SuperRatings Best Innovation for 2020 at the Superannuation awards. Raiz was ranked #27<sup>th</sup> in Deloitte's Fast 50 winners Report for 2020. The Raiz platform continues to grow with over 17 new products and features released since launch.

Raiz Invest Limited operates in Australia, Indonesia and Malaysia as part of the growth and expansion strategy of the business throughout Southeast Asia.

For more information visit: [www.raizinvest.com.au](http://www.raizinvest.com.au)

This document has been prepared for informational purposes only and is not intended to amount to financial product advice or a recommendation in relation to any investments or securities. You should not rely on it to make investment decisions. This document contains general factual information only and has not been independently verified. Any opinions or information expressed in the document are subject to change without notice.

<sup>i</sup> All figures are un-audited.



50

Technology **Fast 50**  
2020 Australia **Top 50**

**Deloitte.**