



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

22 April 2021

Email to Raiz Invest (RZI) customers from George Lucas, Managing Director/CEO

As 2021 unfolds, Raiz's decision to offer customers the opportunity to select their own asset weightings inside their portfolio is proving timely, with more than 8,000 taking advantage of our Custom Portfolio option.

Countries around the globe are responding to their COVID-19 vaccination rollouts differently, in part due to their economic and medical capability, but also because of political necessity. The US and the UK, for example, had a poor initial response to the virus, making it politically critical to get the vaccine rollout right.

Australia has been slow in rolling out the vaccine, in part because its success in containing the virus has removed the element of urgency evident in the UK, US and other developed nations.

These differing responses will have economic and investment consequences. Australia will probably remain closed longer to the rest of the world while the US, UK and some European countries will likely open up more quickly to international trade and travel. Investors will need to ponder these differences when deciding when and how to invest, which is why offering our customised portfolio to allow choice in selecting asset weightings inside individual portfolios is such an important initiative.

At the same time, Bitcoin has been doing well during the quarter as it becomes more mainstream with global institutions to start accepting it as a way of settlement and alternative to cash. VISA was the last large company to announce that transactions could be settled via Bitcoin. Our Sapphire portfolio, with a target weight of 5 per cent to Bitcoin, now has more than 40,000 customers.

Allowing individuals to diversify their investments according to their assessment of the markets, whether through our Standard portfolios, Sapphire or Custom portfolio, is a well-accepted investment principle as it can minimise the risk of loss.

We are very pleased with the initial response to our decision to add these options, which were driven by customer feedback, and we will continue to listen to your feedback. We have also added the ability for SMSFs to onboard via the Raiz platform. This is a \$730 billion sector and will assist us, along with the other new portfolios, to meet our \$1 billion target for funds under management by the end of this calendar year.

None of this would be possible without you, your support in our products and your feedback, to ensure we are continually improving Raiz. Yes, we listen, as the best ideas come from you.

As always, keep safe.

A handwritten signature in black ink, appearing to be 'George Lucas'.

George Lucas
Managing Director /CEO
Raiz Invest Limited



The information in this email is prepared by RAIZ Invest Australia Limited (ABN 26 604 402 815) (Raiz), an authorised representative AFSL 434776. This email has been prepared for informational purposes only and are 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 email contains general factual information only generated by an algorithmic system that uses the portfolio data input into the system. Information used as raw data to generate the email has not been independently verified. Therefore, we have not taken into account your investment objectives, financial situation or needs. You should seek professional financial, legal and taxation advice. Any returns shown or implied in this email are not forecasts and are not reliable guides of future performance. Information contained in this report has been calculated based on variable factors and may not eventuate. Any opinions or information expressed in the email are subject to change without notice.

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.

- ENDS -

Market Announcement authorised by:

George Lucas
MD /Group CEO
Raiz Invest Limited

Investor and Media Enquiries:

Brendan Malone
ir@raizinvest.com.au