Peak Investment Partners

Tailored Investment strategies for growing your wealth

Peak Investment Partners

Performance with Relationship

Privately Owned Portfolio Management Company

- Established in 2003 providing individually managed accounts (IMA's)
- Trusted relationships with 260 families with over 480 individual portfolios
- Portfolios under management >$1.0bn

Why Peak

- Our portfolio managers have global market experience
- Clients have direct communication with their Fund Manager
- Our staff own the firm, placing our business in partnership with clients
- We are independent of any financial institution or product issuer

Your Personal Portfolio Management Team

		Experience
Ian Wenham	– CEO, Co-CIO & Portfolio Manager	> 45 yrs
Andrew Martin	– Director & Portfolio Manager	> 40 yrs
Paul Israel	– Co-CIO & Portfolio Manager	> 25 yrs
Stuart Dear	– Director & Portfolio Manager	> 25 yrs

Direct Securities

- Manage Direct Australian Equities, Australian Hybrid income securities and overseas investments

Our Clients

- High net worth families - Individuals, Family Trusts, DIY Super, Companies & Not for Profits

MODEL PORTFOLIOS PERFORMANCE

TO 31 OCT 2025	*Inception p.a.*	*10 Yrs p.a.*	*5 Yrs p.a.*	*3 Yrs p.a.*	*1 Yr*
LOWER RISK					
Peak Australian Income[1]	**9.1%**	**9.9%**	**10.9%**	**12.9%**	**11.2%**
ASX 300 Accumulation Index	7.1%	9.7%	12.6%	13.0%	12.7%
Gain over index	***+2.0%***	***+0.2%***	***-1.7%***	***-0.1%***	***-1.5%***
HIGHER RISK					
Peak Industrial Growth[2]	**9.7%**	**9.8%**	**11.0%**	**13.6%**	**5.4%**
ASX 200 Accumulation Index	7.1%	9.7%	12.6%	13.0%	12.5%
Gain over index	***+2.6%***	***+0.1%***	***-1.6%***	***+0.6%***	***-7.1%***
Peak Australian High Growth[3]	**9.9%**	**10.6%**	**11.5%**	**12.7%**	**6.6%**
ASX 200 Accumulation Index	7.2%	9.7%	12.6%	13.0%	12.5%
Gain over index	***+2.7%***	***+0.9%***	***-1.1%***	***-0.3%***	***-5.9%***
Peak Smaller Companies[4]	**11.1%**		**9.7%**	**12.7%**	**24.9%**
ASX Smaller Ordinaries Accum. Index	8.6%		9.6%	13.9%	22.8%
Gain over index	***+2.5%***		***+0.1%***	***-1.2%***	***+2.1%***

Source: Peak Australian Income, Peak Industrial Growth and Peak Australian High Growth: Praemium Model Portfolios
Peak Smaller Companies Model: Powerwrap historical data for model portfolio between 14/9/12 and 27/3/17, and Praemium model portfolio since 27/3/17

[1] *Inception — 18/06/2006*
[2] *Inception — 18/10/2006*
[3] *Inception — 10/10/2006*
[4] *Inception — 17/03/2017*

Model Portfolio Performance is based on the theoretical performance of the Model Portfolio and does not take into account any fees applicable.
Such fees may include Model Portfolio Investment Fees, Administration Fees and certain transactional and operation costs.
Applicable fees are set out in the Peak Financial Services Guide.
Actual Portfolios may not perform in the same manner as Model Portfolios, depending on the customisations and timing issues.
Accordingly, the actual after tax returns you receive are likely to be different from the Model Portfolio returns and those of other investors.
Past Performance is no indicator of future performance. The value of investments and the income from them can fall as well as rise and is not guaranteed.

Peak Investment Partners Pty Ltd is an Authorised Representative of Peak Investment Holdings Pty Ltd AFSL 304008
Level 11, 56 Pitt Street, Sydney NSW 2000, Australia

Contact us for more information: (+61 2) 8274 5800 I info@peakinvest.com.au I www.peakinvest.com.au

Peak Investment Partners

Australian Income

OCT 2025

The Peak Income Model is a portfolio constructed of higher yielding Australian shares. It aims to provide investors with a stable income stream with diversification benefits to reduce risk.

Portfolio Description

The Peak Investment Partners Income Model is a separately managed account (SMA) actively managed by Peak Investment Partners (Peak). SMAs are professionally managed portfolios of direct shares where the investor receives beneficial ownership of the underlying securities.

Investor Profile

The Income Model is designed for investors who:

- Seek a tax effective income stream with some capital growth
- Have a medium to long-term investment horizon
- Accept the risk of significant share price fluctuations

Key Portfolio Features

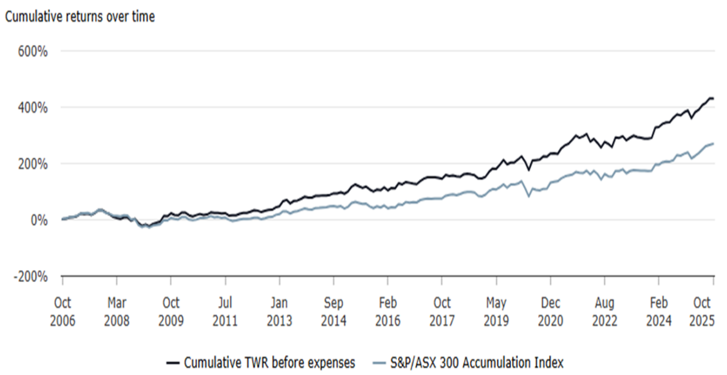
Model Inception	18/06/2006
Benchmark	S&P/ ASX 300 Accumulation Index
Number of Stocks	15 - 30
Investment Horizon	Over 5 years
Authorised Investments	Australian Shares & Cash

Performance to 31st OCT 2025

Return %	Inception (%p.a.)	5yr (%p.a.)	3yr (%p.a.)	1yr (%)
Income Model	9.1%	10.9%	12.9%	11.2%
ASX 300 Accum.	7.1%	12.6%	13.0%	12.7%
Outperformance	**+2.0%**	**-1.7%**	**-0.1%**	**-1.5%**

Figures presented are provided by Praemium and are before expenses. Information correct as at 31st OCT 2025

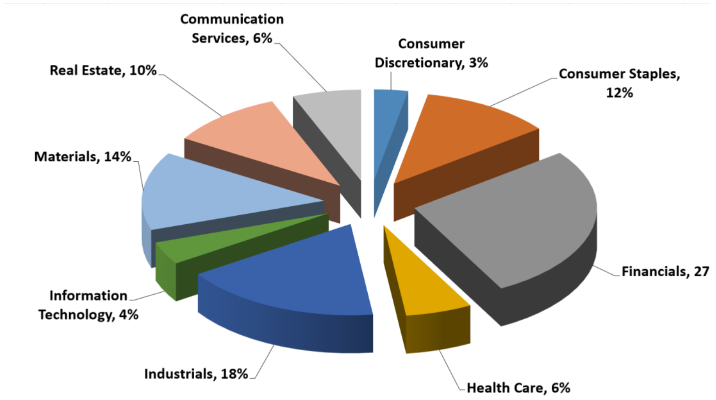
Past performance is not a reliable indicator of future performance. While returns above and the chart below are from the model portfolio within Praemium, they are not the actual performance but indicative of the portfolio performance in Praemium.



Top 10 Holdings

#	Company	Portfolio Weighting
1	Commonwealth Bank	10.1%
2	Northern Star	8.7%
3	Wesfarmers Limited	7.3%
4	Macquarie Group Limited	6.6%
5	Carsales.com Limited	6.1%
6	Resmed	5.9%
7	ANZ Banking Group Limited	5.6%
8	Goodman Group	5.5%
9	BHP Billiton Limited	5.2%
10	National Aust. Bank	5.2%

Sector Allocation



Peak Investment Partners

Founded in 2003, Peak is a successful boutique Australian portfolio manager who partners with individuals, families and 'not for profit' organisations to achieve their investment management goals. Predominantly owned and operated by its directors, Peak delivers private, trusted advice and matches investment solutions to individual needs, wants and circumstances.

Portfolio managers Ian Wenham and Paul Israel are experienced in research and funds management, having held senior positions with leading global investment banks in Australia, Hong Kong as well as with Australian fund managers

Their expertise at managing investment portfolios combined with in-depth experience in global investment markets means that Peak consistently achieves superior portfolio outcomes for its clients.

Contact us for more information: (+61 2) 8274 5800 I info@peakinvest.com.au I www.peakinvest.com.au

Peak Investment Partners

Industrial Growth

OCT 2025

The Peak Industrial Growth Model is designed to providing investors with stable long-term capital gains, consistent real returns and diversification benefits to reduce risk

Portfolio Description

The Peak Industrial Growth Model is a separately managed account (SMA) actively managed by Peak Investment Partners (Peak). SMAs are professionally managed portfolios of direct shares where the investor receives beneficial ownership of the underlying securities.

Investor Profile

The Industrial Growth Model is designed for investors who:

- Seek prospects for capital growth with some income
- Have a medium to long-term investment horizon
- Accept the risk of significant share price fluctuations

Key Portfolio Features

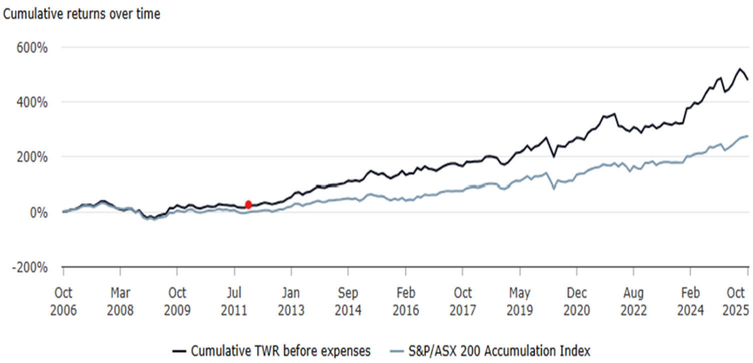
Model Inception	18/10/2006
Benchmark	S&P/ ASX 200 Accumulation Index
Number of Stocks	15 - 30
Investment Horizon	Over 5 years
Authorised Investments	Australian Shares & Cash

Performance to 31st OCT 2025

Return %	Inception (%p.a.)	5yr (%p.a.)	3yr (%p.a.)	1yr (%)
Aus Indus. Gwth	9.7%	11.0%	13.6%	5.4%
ASX 200 Accum.	7.1%	12.6%	13.0%	12.5%
Outperformance	**+2.6%**	**-1.6%**	**+0.6%**	**-7.1%**

Figures presented are provided by Praemium and are before expenses. Information correct as at 31st OCT 2025

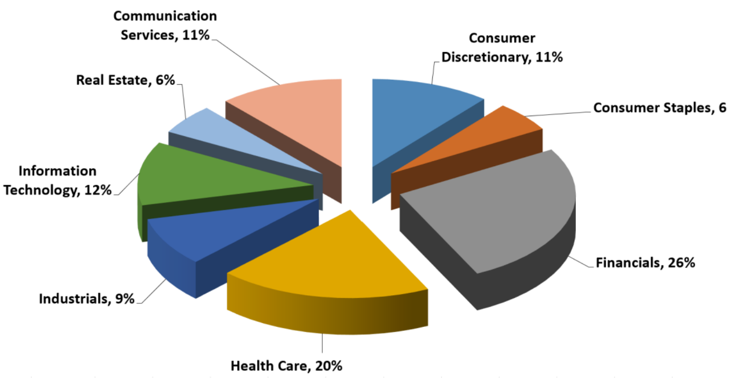
Past performance is not a reliable indicator of future performance. While returns above and the chart below are from the model portfolio within Praemium, they are not the actual performance but indicative of the portfolio performance in Praemium.



Top 10 Holdings

#	Company	Portfolio Weighting
1	Commonwealth Bank	8.3%
2	Macquarie Group Limited	7.2%
3	Aristocrat Leisure	6.5%
4	Resmed	6.4%
5	Carsales.com Limited	6.3%
6	Technology One	5.9%
7	Wesfarmers Limited	5.6%
8	Goodman Group	5.5%
9	REA Group	5.2%
10	Brambles Limited	5.2%

Sector Allocation



Peak Investment Partners

Founded in 2003, Peak is a successful boutique Australian portfolio manager who partners with individuals, families and 'not for profit' organisations to achieve their investment management goals. Predominantly owned and operated by its directors, Peak delivers private, trusted advice and matches investment solutions to individual needs, wants and circumstances.

Portfolio managers Ian Wenham and Paul Israel are experienced in research and funds management, having held senior positions with leading global investment banks in Australia, Hong Kong as well as with Australian fund managers

Their expertise at managing investment portfolios combined with in-depth experience in global investment markets means that Peak consistently achieves superior portfolio outcomes for its clients.

Contact us for more information: (+61 2) 8274 5800 I info@peakinvest.com.au I www.peakinvest.com.au

Peak Investment Partners

Australian High Growth

OCT 2025

The Peak Australian High Growth Model is designed to providing investors with stable long-term capital gains, consistent real returns and diversification benefits to reduce risk

Portfolio Description

The Peak Australian High Growth Model is a separately managed account (SMA) actively managed by Peak Investment Partners (Peak). SMAs are professionally managed portfolios of direct shares where the investor receives beneficial ownership of the underlying securities.

Investor Profile

The Australian High Growth Model is designed for investors who:

- Seek prospects for capital growth with some income
- Have a medium to long-term investment horizon
- Accept the risk of significant share price fluctuations

Key Portfolio Features

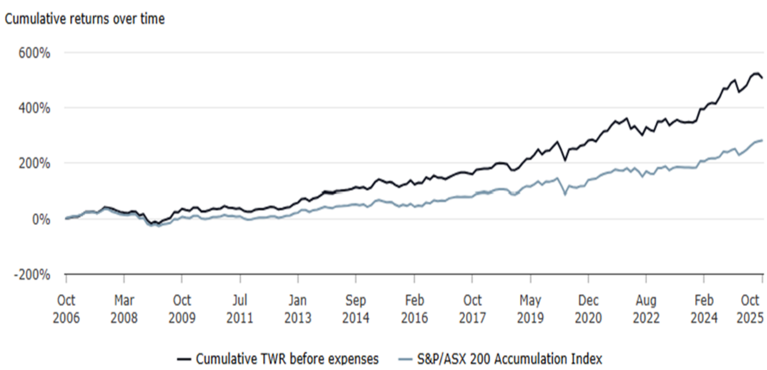
Model Inception	10/10/2006
Benchmark	S&P/ ASX 200 Accumulation Index
Number of Stocks	15 - 30
Investment Horizon	Over 5 years
Authorised Investments	Australian Shares & Cash

Performance to 31st OCT 2025

Return %	Inception (%p.a.)	5yr (%p.a.)	3yr (%p.a.)	1yr (%)
Aus High Growth	9.9%	11.5%	12.7%	6.6%
ASX 200 Accum.	7.2%	12.6%	13.0%	12.5%
Outperformance	**+2.7%**	**-1.1%**	**-0.3%**	**-5.9%**

Figures presented are provided by Praemium and are before expenses. Information correct as at 31st OCT 2025.

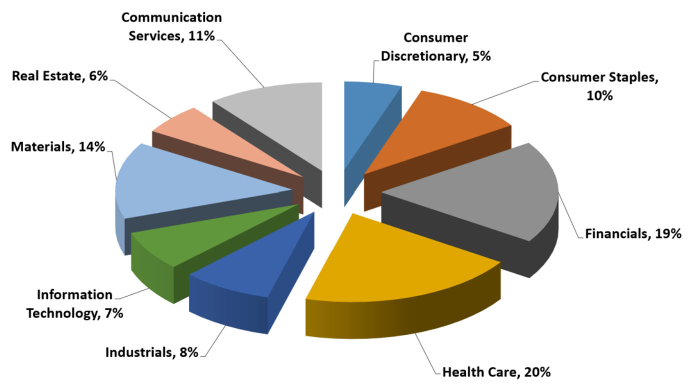
Past performance is not a reliable indicator of future performance. While returns above and the chart below are from the model portfolio within Praemium, they are not the actual performance but indicative of the portfolio performance in Praemium.



Top 10 Holdings

#	Company	Portfolio Weighting
1	Commonwealth Bank	9.5%
2	Northern Star	7.8%
3	BHP Billiton Limited	6.2%
4	Wesfarmers Limited	5.9%
5	Technology One	5.8%
6	Carsales.com Limited	5.7%
7	Goodman Group	5.7%
8	Macquarie Group Limited	5.6%
9	Aristocrat Leisure	5.3%
10	Resmed	5.1%

Sector Allocation



Peak Investment Partners

Founded in 2003, Peak is a successful boutique Australian portfolio manager who partners with individuals, families and 'not for profit' organisations to achieve their investment management goals. Predominantly owned and operated by its directors, Peak delivers private, trusted advice and matches investment solutions to individual needs, wants and circumstances.

Portfolio managers Ian Wenham and Paul Israel are experienced in research and funds management, having held senior positions with leading global investment banks in Australia, Hong Kong as well as with Australian fund managers

Their expertise at managing investment portfolios combined with in-depth experience in global investment markets means that Peak consistently achieves superior portfolio outcomes for its clients.

Peak Investment Partners

Smaller Companies

OCT 2025

The Peak Smaller Companies Model is designed for growth opportunities holding stocks that are under recognised in the global marketplace allowing investors to reap gains before mutual funds invest.

Portfolio Description

The Peak Investment Partners Smaller Companies Model is a separately managed account (SMA) actively managed by Peak Investment Partners (Peak). SMAs are professionally managed portfolios of direct shares where the investor receives beneficial ownership of the underlying securities.

Investor Profile

The Smaller Companies Model is designed for investors who:

- Seek prospects for capital growth with some income
- Have a medium to long-term investment horizon
- Accept the risk of significant share price fluctuations

Key Portfolio Features

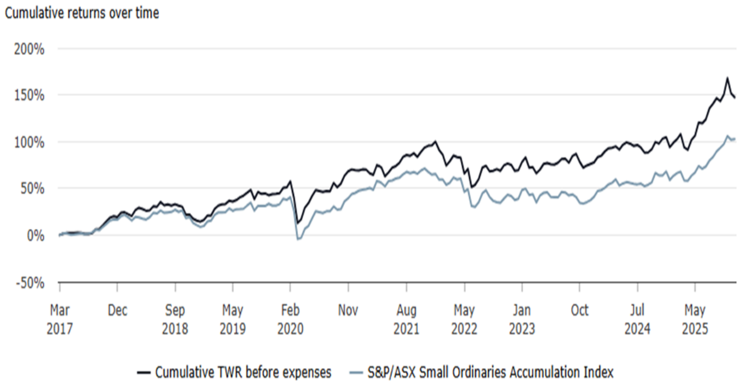
Model Inception	17/03/2017
Benchmark	S&P/ ASX Small Ords Accumulation Index
Number of Stocks	15 - 30
Investment Horizon	Over 5 years
Authorised Investments	Australian Shares & Cash

Performance to 31st OCT 2025

Return %	Inception (%p.a.)	5yr (%p.a.)	3yr (%p.a.)	1yr (%)
Small Cap Model	11.1%	9.7%	12.7%	24.9%
ASX Small Ords	8.6%	9.6%	13.9%	22.8%
Outperformance	**+2.5%**	**+0.1%**	**-1.2%**	**+2.1%**

Figures presented are provided by Praemium and are before expenses. Information correct as at 31st OCT 2025.

Past performance is not a reliable indicator of future performance. While returns above and the chart below are from the model portfolio within Praemium, they are not the actual performance but indicative of the portfolio performance in Praemium.

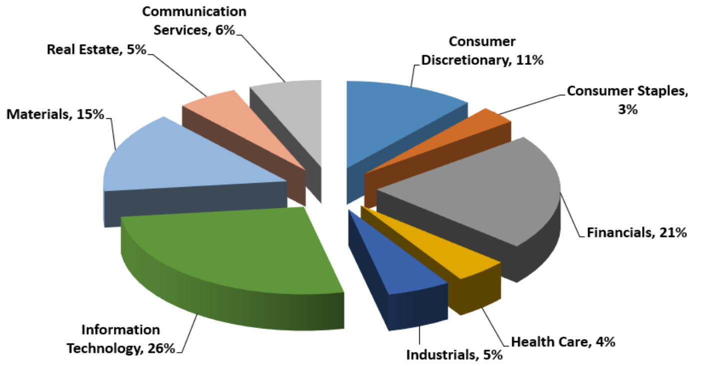


Top 10 Holdings

#	Company	Portfolio Weighting
1	Droneshield	7.4%
2	Lynas Corporation	6.0%
3	Catapult Group Int Limited	4.7%
4	Northern Star	4.3%
5	Pinnacle Investment	4.1%
6	Aussie Broadband	4.0%
7	Megaport Limited	3.7%
8	Life 360	3.7%
9	Netwealth Group	3.4%
10	Siteminder	3.3%

*Mandate for Smaller Companies model allows a maximum of 30% within the ASX100

Sector Allocation



Peak Investment Partners

Founded in 2003, Peak is a successful boutique Australian portfolio manager who partners with individuals, families and 'not for profit' organisations to achieve their investment management goals. Predominantly owned and operated by its directors, Peak delivers private, trusted advice and matches investment solutions to individual needs, wants and circumstances.

Portfolio managers Ian Wenham and Jonathan Liu are experienced in research and funds management, having held senior positions with leading global investment banks in Australia, Hong Kong as well as with Australian fund managers

Their expertise at managing investment portfolios combined with in-depth experience in global investment markets means that Peak consistently achieves superior portfolio outcomes for its clients.