



ASX Release

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

Raiz Invest Limited (**Raiz** or **the Company**) today announced its Australian, Indonesian and Malaysian Active Customers and Australian Funds under Management (**FUM**) update for the month to 31 August 2021<sup>i</sup>.

### Commentary

Raiz Managing Director/Global CEO George Lucas says: “Raiz is ahead of schedule to reach its \$1 billion target of Funds under Management (**FUM**) by 31 December 2021. Although markets are often volatile in September and October, we remain cautiously optimistic this milestone will be reached, with FUM growth of 6.9% in August (compared with a 1.9% rise for the ASX) to \$967.4 million being another important step towards this goal.

“We released two new ETFs for our Custom Portfolio option, again demonstrating how agile Raiz is by listening and responding to customer feedback. The addition of the Vanguard MSCI Australian Small Companies Index ETF (VSO.AU) and the Vanguard Ethically Conscious Globally Aggregated Bond Index Hedged ETF (VEFI.AU) to the Portfolio reflects alignment with our strategy and customer demand for access to small-cap and ethically themed investments.

“The take up of the Custom Portfolio option is another illustration of the improving financial literacy across our customer base. This observation is also backed up by increasing engagement with our online educational content. The result, we hope, reflects positive changes in our customer behaviour towards saving and investing.

“Indonesia and Malaysia continued to do well, with Indonesia in particular growing strongly in August with Active Customers up 11.3% to 144,269. Despite COVID, we continue to be on track in Southeast Asia. But we remain very conscious of the health situation in both countries and the impact it is having on staff and customers and their families. Our thoughts and best wishes are with them.”

### Global Active Customers

	31 August 2021	31 July 2021	1 Month % change	3 Month % change	12 Month % change
Customer Sign Ups	2,024,923	1,901,684	+6.5%	+18.7%	+87.7%
Investment Accounts	984,057	921,211	+6.8%	+19.4%	+97.1%
<b>Active Customers</b>	<b>508,124</b>	<b>484,975</b>	<b>+4.8%</b>	<b>+16.2%</b>	<b>+85.4%</b>



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

AUD	31 August 2021	31 July 2021	1 Month % change	3 Month % change	12 Month % change
Customer Sign Ups	1,130,392	1,114,363	+1.4%	+4.8%	+24.3%
Investment Accounts	541,685	533,064	+1.6%	+5.8%	+29.3%
<b>Active Customers</b>	<b>286,789</b>	<b>282,419</b>	<b>+1.5%</b>	<b>+6.0%</b>	<b>+26.0%</b>
Retail	\$781.84m	\$723.82m	+8.0%	+18.5%	+83.1%
Superannuation	\$185.57m	\$181.00m	+2.5%	+81.8%	+161.0%
<b>Total FUM</b>	<b>\$967.41m</b>	<b>\$904.82m</b>	<b>+6.9%</b>	<b>+27.0%</b>	<b>+94.2%</b>

### Southeast Asia - Active Customers

	31 August 2021	31 July 2021	1 Month % change	3 Month % change
<b>Indonesia</b>				
Customer Sign Ups	545,228	464,882	17.3%	46.3%
Investment Accounts	323,685	280,006	15.6%	40.1%
<b>Active Customers</b>	<b>144,269</b>	<b>129,574</b>	<b>11.3%</b>	<b>34.6%</b>
<b>Malaysia</b>				
Customer Sign Ups	349,303	322,439	8.3%	37.4%
Investment Accounts	118,687	108,141	9.8%	46.1%
<b>Active Customers</b>	<b>77,066</b>	<b>72,982</b>	<b>5.6%</b>	<b>29.1%</b>

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#### Market Announcement authorised by:

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## About Raiz

Raiz Invest Limited (ASX:RZI) is a multi-award-winning micro-investing and fintech platform with operations in Australia and Southeast Asia. With Raiz, users are able to automatically invest the virtual 'spare change' from their daily purchases into diversified portfolios. In Australia, this can be done to boost savings both inside and outside of superannuation.

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 2.1 million downloads, 2,024,000 signups, and over 508,000 active monthly customers with over \$967 million Funds under Management as at 31 August 2021.

Raiz continues to enhance its platform, adding 18 new products and features since its inception. In addition, Raiz is ramping up its growth and literacy strategy across Asia-Pacific, with offices in Malaysia and Indonesia with plans to expand into Thailand and Vietnam.

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

