



## **ASX Announcement | 1 August 2025**

### **Raiz Invest Limited (ASX:RZI)**

#### **Raiz announces new Raiz Lite product and updated fee schedule**

Raiz Invest Limited ('**Raiz**' or '**the Company**') (ASX:RZI), a leading investment app, designed to help all Australians create wealth, today announced the launch of a major new product offering and enhancements to its platform.

##### **Launch of Raiz Lite - Attracting first-time investors**

Raiz is excited to introduce Raiz Lite, a new plan designed specifically for first time investors. Raiz Lite offers three different portfolio options - Conservative, Moderately Conservative and Moderate, each comprising ASX quoted Exchange Traded Funds (ETFs).

Subscribers to Raiz Lite will also have access to the Raiz Rewards program which provides cashback on everyday spending.

Raiz Lite features a lower monthly maintenance fee of \$2.50 for users who maintain an account balance below \$1,500. (Other terms and conditions apply).

##### **Expanded investment options for Raiz Plus**

Raiz Plus enables investors the flexibility to create their own portfolio from a wide range of ETFs and ASX listed stocks.

In response to customer demand, the investment options within Raiz Plus have been expanded to include over 155 investment options including ETFs, ASX listed stocks, Bitcoin and the Raiz Property Fund.

##### **Launch of Raiz Academy – Boosting Financial Literacy**

Set to be launched later this month, Raiz Academy is a comprehensive online education centre, created to empower Australians with practical financial knowledge. Raiz Academy complements Raiz's investment platform with flexible online learning, allowing users to progress at their own pace, anytime and anywhere on any device.

##### **CEO Commentary**

Raiz Invest CEO and Managing Director, Brendan Malone, said: "At Raiz we continue to deliver innovative solutions to support our customers' savings and investment goals, while improving their financial literacy.

Our vision is to transform the way people think about saving and investing, by giving them the tools and knowledge to feel empowered and financial confident.

Raiz Lite reduces the barriers to entry for new investors, with a lower entry cost to help consistent investing habits. Raiz Academy further reinforces our commitment to improving financial literacy for all Australians by providing easy-to-understand educational content".



## Updated Fee Schedule

The following changes will apply to the monthly Maintenance Fee and Account Fee for all Plans offered, effective 1 August 2025:

Raiz Plans	Current Fees			New Fees		
	Account Balance	Monthly Maintenance Fees	Account Fee	Account Balance Change	Monthly Maintenance Fees	Account Fee
Lite Plan	-	-	-	Up to \$1,500	\$2.50	Nil
Regular Plan*	Under \$20,000	\$4.50	-	Under \$26,000	\$5.50	-
	Over \$20,000	-	0.275% p.a.	Over \$26,000	-	0.275% p.a.
Plus Plan	Under \$25,000	\$5.50	-	Under \$28,000	\$6.50	-
	Over \$25,000	-	0.275% p.a.	Over \$28,000	-	0.275% p.a.

\*Please note that for the Sapphire and Property Portfolios under the Regular Plan, the account fee of 0.275% p.a. and monthly maintenance fee of \$5.50 apply to all account balances.

There are no changes to Raiz Invest Super fees.

Mr Malone added: “Any changes to our fee structure are made after careful consideration. We aim to strike the right balance between delivering best-in-class investment tools and platform experience, while ensuring the long-term sustainability and growth of our business.

Today’s announcement reflects this commitment. The revised fee structure supports customer-driven platform and service enhancements that help achieve savings and investing goals, whilst maintaining a competitive price point.”

\*\*\*ENDS\*\*\*

## Authorised for release by the Board of Directors

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## About Raiz Invest Limited

Raiz Invest Limited (ASX: RZI) is a multi-award-winning fintech platform to help all Australians create wealth. Raiz pioneered the ‘Round-Up’ concept in Australia – where everyday purchases are rounded-up to the next dollar and the difference is invested into a Raiz Investment account – opening opportunities for first-time investors.

Raiz is committed to enriching the financial wellbeing of all Australians. At Raiz, we believe that everyone deserves a better financial future, regardless of age, income, or experience. Our vision is simple: to enrich the financial wellbeing of all Australians by providing accessible, empowering, and smart investment options. We are on a mission to transform the way people think about saving and investing, making it easier for all Australians to take control of their financial future. Raiz – Investing made simple.

To find out more, please visit [www.raizinvest.com.au](http://www.raizinvest.com.au) or the Investor Hub <https://investorhub.raizinvest.com.au/>.