

TAX EFFECTIVE STRATEGY

C2 Gateway Series
112-120 & 124, 125, 126

DISCLAIMER: WHOLESAL, PROFESSIONAL OR SOPHISTICATED INVESTORS ONLY

GENERAL ADVICE WARNING

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We strongly recommend you to seek the advice of financial, taxation, and legal professionals before finalising any investment decisions.

For further details about our services, please refer to our Financial Services Guide. MPC Equities Pty Ltd. is not responsible for any actions taken based on the information provided in this infographic.

HIGH TAX ON HIGH INCOME EARNERS

Fred, a FIFO worker with an income of \$300,000, faces a high tax rate.

On earnings above \$190,000, Fred pays 47%, amounting to \$51,700.

Do you know anyone in a similar situation and looking for relief?



INTEREST ON INVESTMENT PROPERTY NEGATIVE GEARING EXAMPLE

\$1,200,000 Investment Property

\$200,000 Deposit or Equivalent Equity Required

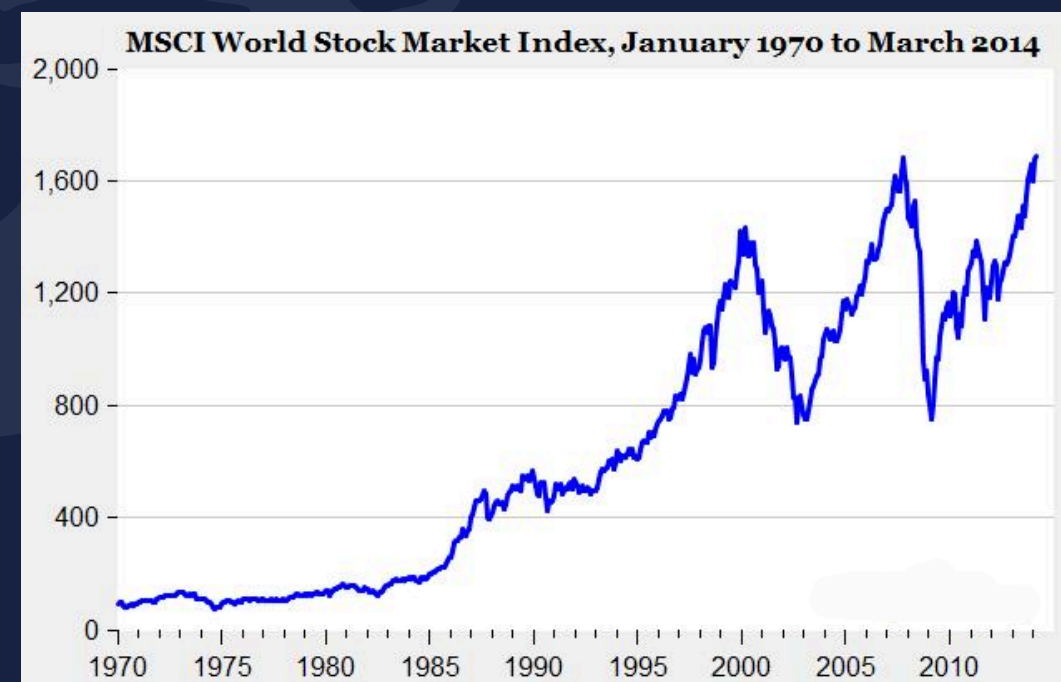
\$1,000,000 Investment loan @ 6% = \$60,000 of tax deductions



C2 GATEWAY TAX EFFECTIVE INVESTMENT

C2 uses a non-recourse loan to gain upside exposure to a stock market index, while an interest loan minimizes out-of-pocket expenses. The structure ensures there is no downside exposure beyond your initial investment.

Invest \$18,369 to gain tax deductions of \$100,000 and upside exposure to \$1,500,000 worth of a stock market index.



INVESTMENT SCENARIOS: POTENTIAL OUTCOMES IF THE STOCK MARKET UNDERPERFORMS

Date	Oct 2025	Oct 2026	Oct 2027		Total
Net Pre-Tax Cashflow	-18369	-12092	121		-25340
Taxable Income Calculation	FY 2026	FY 2027	FY 2028		
Taxable Income / (Loss)	-100000	-11432	23127		-88305
Tax Refund / (Expense)	47000	5373	-10870		41503
Financial Year Post-Tax Cashflow	28631	-6719	-10749		11163
Summary	Return on FY 2026 Cashflow				61%
	Return on all cashflows through investment				37%

February 2025: Fred invests \$18,369

2025/2026 Tax Year: Fred receives a \$47,000 tax refund

2026/2027 Tax Year: Fred pays \$6,719 at rollover

2027/2028 Tax Year: Fred pays \$10,749, with a total return of \$11,163

Overall return: \$11,163. A positive result even when the market is down

INVESTMENT SCENARIOS: POTENTIAL OUTCOMES IF THE STOCK MARKET RETURNS 7% PA

Date	Oct 2025	Oct 2026	Oct 2027		Total
Net Pre-Tax Cashflow	-18369	-3922	8291		-13999
Taxable Income Calculation	FY 2026	FY 2027	FY 2028		
Taxable Income / (Loss)	-100000	-3262	27212		-76049
Tax Refund / (Expense)	47000	1533	-12790		35743
Financial Year Post-Tax Cashflow	28631	-2389	-4498		21744
Summary	Return on FY 2026 Cashflow				118%
	Return on all cashflows through investment				97%

February 2025: Fred invests \$18,369

2025/2026 Tax Year: Fred receives a \$47,000 tax refund

2026/2027 Tax Year: Fred pays \$2,389

2027/2028 Tax Year: Fred pays \$4,489, with a total return of \$21,744

Overall return: \$21,744. Higher return when the market performs

INVESTMENT SUMMARY

Fred without C2

FY 25/26 Tax on \$300,000: \$101,138

No stock market exposure

Fred with C2

Taxable income reduced to \$200,000

FY 25/26 Tax on \$200,000: \$56,138

*Initial Investment: \$18,369, leading to
a \$47,000 tax refund*

*Extra cash in hand: \$28,631 with stock
market exposure*

HOW TO CONTACT US



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