

Industry Survey: July 2026

PORTFOLIO	Equity Allocation	1 year	3-years (Annualised)	5-years (Annualised)
Destiny Market Enhanced	>67%	13.29%	15.48%	13.44%
Destiny Moderate	50%-67%	13.32%	15.36%	13.22%
Allan Gray Balanced *	>67%	15.10%	15.20%	14.10%
Destiny Conservative	40%-50%	13.27%	15.08%	12.81%
Alexforbes Performer	>67%	14.50%	14.92%	13.14%
Momentum Enhanced Factor 7	>67%	12.49%	14.43%	12.94%
Sygnia Skeleton Balanced 70 *	>67%	13.50%	14.30%	12.00%
Destiny Defensive	<40%	12.68%	14.28%	11.99%
Discovery Life Balanced	>67%	10.71%	13.72%	11.51%
Momentum Enhanced Factor 4	<40%	12.00%	13.45%	11.54%
Alexforbes Conserver	40%-50%	12.01%	13.41%	12.01%
PSG Stable *	<40%	15.94%	13.36%	12.30%
Fairtree Balanced *	>67%	10.03%	12.92%	11.14%
Sygnia Skeleton Balanced 40 *	40%-50%	12.00%	12.80%	10.80%
Coronation Balanced Plus *	>67%	6.00%	12.70%	10.90%
Liberty Core Conservative	40%-50%	10.65%	12.46%	10.63%
Liberty Single Manager Growth	>67%	9.59%	12.39%	11.26%
Old Mutual Absolute Stable Growth *	50%-67%	16.10%	12.20%	11.10%
Allan Gray Stable *	40%-50%	11.60%	12.10%	11.10%
Sanlam Volatility Protection Strategy	50%-67%	12.60%	11.80%	10.30%
10X Your Future	>67%	8.60%	11.50%	11.00%
Coronation Balanced Defensive *	<40%	7.20%	11.40%	9.80%
Sanlam Stable Bonus	<40%	12.30%	11.30%	10.00%
Ninety One Managed *	50%-67%	7.20%	11.30%	8.70%
10X Defensive	<40%	8.70%	11.00%	9.80%
Foord Balanced *	>67%	8.70%	10.80%	10.20%
Foord Conservative *	50%-67%	7.20%	10.50%	9.60%

* Unit trust returns are net returns earned.