

Industry Survey: May 2026

PORTFOLIO	1 year	3-years (Annualised)	5-years (Annualised)
Destiny Market Enhanced	19.38%	16.75%	13.89%
Destiny Moderate	18.99%	16.51%	13.63%
Destiny Conservative	18.42%	16.09%	13.18%
Alexforbes Performer	20.09%	15.86%	13.74%
Sygnia Skeleton Balanced 70 *	19.80%	15.80%	12.50%
Allan Gray Balanced *	19.40%	15.40%	13.90%
Momentum Enhanced Factor 7	16.84%	15.27%	13.45%
Destiny Defensive	16.92%	15.03%	12.29%
Fairtree Balanced *	18.28%	14.82%	11.83%
Discovery Life Balanced	16.65%	14.47%	12.07%
Alexforbes Conserver	15.28%	14.33%	12.34%
Liberty Single Manager Growth	14.47%	13.98%	12.04%
Momentum Enhanced Factor 4	15.59%	13.93%	11.95%
PSG Stable *	19.01%	13.83%	11.96%
Liberty Core Conservative	14.47%	13.70%	11.23%
Sygnia Skeleton Balanced 40 *	15.90%	13.70%	11.10%
Coronation Balanced Plus *	9.60%	13.50%	10.90%
10X Moderate	12.30%	12.20%	11.40%
Sanlam Volatility Protection Strategy	13.90%	12.10%	10.50%
Coronation Balanced Defensive *	9.20%	11.70%	9.80%
10X Defensive	11.50%	11.50%	10.40%
Old Mutual Absolute Stable Growth *	14.00%	11.40%	10.70%
Allan Gray Stable *	12.40%	11.30%	10.90%
Sanlam Stable Bonus	12.20%	11.30%	9.80%
Ninety One Managed *	10.70%	11.20%	9.40%
Foord Balanced *	11.10%	10.80%	10.30%
Foord Conservative *	9.60%	10.40%	9.70%

* Unit trust returns are net returns earned.

Allocation to equities

	>67%		40%-50%
	50%-67%		<40%