

# Industry Survey: 31 December 2025

PORTFOLIO	1 year	3-years (Annualised)	5-years (Annualised)
Destiny Market Enhanced	23.84%	<b>17.55%</b>	15.43%
Destiny Moderate	22.86%	<b>17.21%</b>	14.96%
Momentum Enhanced Factor 7	20.33%	<b>16.88%</b>	15.19%
Alexforbes Performer	21.85%	<b>16.77%</b>	14.96%
Destiny Conservative	21.50%	<b>16.71%</b>	14.17%
Coronation Balanced Plus *	19.50%	<b>16.50%</b>	13.50%
Sygnia Skeleton Balanced 70 *	22.00%	<b>16.50%</b>	13.30%
Fairtree Balanced *	25.79%	<b>16.36%</b>	14.16%
Discovery Life Balanced	22.43%	<b>16.32%</b>	14.21%
Liberty Single Manager Growth	19.76%	<b>15.85%</b>	13.43%
Allan Gray Balanced *	24.00%	<b>15.60%</b>	15.00%
Destiny Defensive	18.63%	<b>15.51%</b>	12.76%
Momentum Enhanced Factor 4	17.42%	<b>15.01%</b>	13.05%
Alexforbes Conserver	17.93%	<b>14.95%</b>	13.16%
Liberty Core Conservative	18.24%	<b>14.88%</b>	12.05%
10X Moderate	15.80%	<b>14.30%</b>	12.70%
Sygnia Skeleton Balanced 40 *	16.10%	<b>14.00%</b>	11.30%
Foard Balanced *	17.40%	<b>13.90%</b>	11.60%
PSG Stable *	20.01%	<b>13.84%</b>	13.86%
Coronation Balanced Defensive *	14.50%	<b>13.80%</b>	10.80%
10X Defensive	13.10%	<b>13.00%</b>	11.00%
Foard Conservative *	13.30%	<b>12.80%</b>	10.50%
Ninety One Managed *	16.70%	<b>12.30%</b>	10.00%
Sanlam Volatility Protection Strategy	14.00%	<b>12.20%</b>	10.60%
Allan Gray Stable *	14.80%	<b>12.10%</b>	11.50%
Old Mutual Absolute Stable Growth *	13.30%	<b>11.20%</b>	10.90%
Sanlam Stable Bonus	11.60%	<b>11.00%</b>	9.40%

\* Unit trust returns are net returns earned.

Allocation to equities

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