

Industry Survey: 30 September 2025

PORTFOLIO	1 year	3-years (Annualised)	5-years (Annualised)
Destiny Market Enhanced	19.10%	19.11%	16.44%
Destiny Moderate	18.18%	18.51%	15.79%
Coronation Balanced Plus *	21.50%	18.50%	15.00%
Momentum Enhanced Factor 7	17.70%	18.37%	15.73%
Sygnia Skeleton 70	20.50%	18.20%	13.90%
Fairtree Balanced *	18.49%	18.15%	15.09%
Destiny Conservative	17.28%	17.68%	14.83%
Alexforbes Performer	19.30%	17.61%	15.23%
Allan Gray Balanced *	20.80%	17.20%	15.50%
Liberty Single Manager Growth	17.30%	16.98%	13.70%
Destiny Defensive	15.39%	16.10%	13.14%
Alexforbes Conserver	15.53%	15.64%	13.22%
10X Moderate	13.10%	15.50%	13.30%
Momentum Enhanced Factor 4	15.20%	15.47%	13.36%
Foord Balanced *	14.30%	15.40%	12.00%
Liberty Core Conservative	14.72%	15.32%	11.94%
Sygnia Skeleton 40	16.20%	15.20%	11.70%
Coronation Balanced Defensive *	15.70%	14.60%	11.30%
Foord Conservative *	11.70%	13.80%	10.80%
PSG Stable *	12.52%	13.60%	13.60%
10X Defensive	10.80%	13.20%	11.10%
Ninety One Managed *	20.00%	13.10%	10.80%
Allan Gray Stable *	14.30%	12.50%	11.80%
Sanlam Volatility Protection Strategy	12.60%	12.00%	10.60%
Sanlam Stable Bonus	11.20%	10.40%	9.20%
Old Mutual Absolute Stable Growth *	10.60%	10.10%	10.20%

* Unit trust returns are net returns earned.

Allocation to equities

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