

Industry Survey: 31 July 2025

PORTFOLIO	1 year	3-years (Annualised)	5-years (Annualised)
Destiny Market Enhanced	19.13%	15.87%	15.09%
Destiny Moderate	18.56%	15.57%	14.55%
Coronation Balanced Plus *	21.80%	15.50%	14.30%
Allan Gray Balanced *	17.90%	15.50%	14.40%
Momentum Enhanced Factor 7	17.57%	15.25%	14.55%
Destiny Conservative	17.80%	15.02%	13.74%
Liberty Single Manager Growth	17.84%	14.92%	13.18%
Alexforbes Performer	17.88%	14.83%	14.11%
Fairtree Balanced *	16.86%	14.64%	13.41%
Sygnia Skeleton 70	16.50%	14.30%	12.40%
Destiny Defensive	16.23%	14.04%	12.34%
Liberty Core Conservative	16.27%	13.84%	11.39%
Alexforbes Conserver	15.83%	13.74%	12.45%
Momentum Enhanced Factor 4	15.57%	13.34%	12.58%
Coronation Balanced Defensive *	16.70%	13.20%	11.00%
Foord Balanced *	15.70%	13.00%	10.80%
10X Moderate	12.30%	12.90%	12.20%
Foord Conservative *	14.60%	12.50%	10.00%
Sygnia Skeleton 40	13.90%	12.40%	10.70%
Allan Gray Stable *	12.90%	12.20%	11.20%
PSG Stable *	13.46%	12.12%	13.43%
10X Defensive	11.20%	11.60%	10.30%
Ninety One Managed *	17.10%	11.50%	9.40%
Sanlam Volatility Protection Strategy	12.00%	10.90%	10.10%
Sanlam Stable Bonus	11.10%	10.10%	9.00%
Old Mutual Absolute Stable Growth *	10.50%	10.00%	10.00%

* Unit trust returns are net returns earned.

Allocation to equities

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