

Industry Survey: 30 September 2024

Defensive - Conservative

PORTFOLIO	1 year	3-years (Annualised)	5-years (Annualised)
Destiny Conservative	21.53%	12.39%	12.15%
Alexforbes Conserver	18.74%	11.70%	11.39%
Destiny Defensive	19.65%	11.48%	10.82%
Momentum Enhanced Factor 4	18.49%	11.03%	10.05%
Old Mutual Absolute Stable Growth	11.10%	10.80%	8.70%
Sygnia Skeleton 40	18.20%	10.70%	10.60%
PSG Stable *	14.88%	10.67%	9.76%
10X Defensive	18.20%	10.60%	9.40%
Foord Conservative *	17.30%	10.30%	10.00%
Allan Gray Stable *	11.60%	9.80%	9.00%
Coronation Balanced Defensive *	15.20%	9.50%	8.80%
Sanlam Stable Bonus	10.60%	9.10%	8.20%
Liberty Stable Growth	14.85%	8.76%	9.14%

Moderate - Aggressive

PORTFOLIO	1 year	3-years (Annualised)	5-years (Annualised)
Fairtree Balanced *	21.41%	13.28%	14.89%
Destiny Market Enhanced	22.79%	13.14%	13.13%
Destiny Moderate	22.43%	12.96%	12.64%
Momentum Enhanced Factor 7	21.87%	12.76%	11.21%
Allan Gray Balanced *	14.20%	11.90%	11.20%
Sygnia Skeleton 70	20.60%	11.80%	11.90%
10X Moderate	19.40%	11.70%	10.60%
Alexforbes Performer	19.41%	11.58%	12.41%
Liberty Single Manager Growth	20.43%	11.57%	10.99%
Discovery Life Balanced Fund	21.31%	10.72%	11.10%
Coronation Balanced Plus *	19.80%	10.30%	11.40%
Foord Balanced *	17.30%	10.30%	10.50%
Ninety One Managed *	11.60%	6.20%	8.10%

* denotes a unit trust and therefore returns are net of costs.

