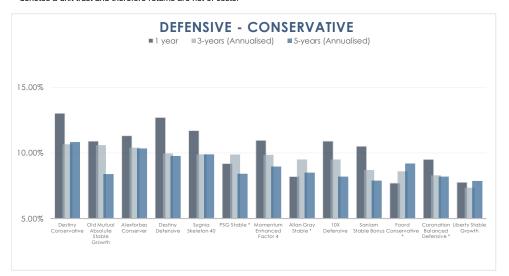
## Industry Survey: 30 June 2024

## **Defensive - Conservative**

| PORTFOLIO                         | 1 year | <b>3-years</b> (Annualised) | <b>5-years</b> (Annualised) |
|-----------------------------------|--------|-----------------------------|-----------------------------|
| Destiny Conservative              | 13.02% | 10.66%                      | 10.83%                      |
| Old Mutual Absolute Stable Growth | 10.90% | 10.60%                      | 8.40%                       |
| Alexforbes Conserver              | 11.31% | 10.41%                      | 10.34%                      |
| Destiny Defensive                 | 12.71% | 9.97%                       | 9.77%                       |
| Sygnia Skeleton 40                | 11.70% | 9.90%                       | 9.90%                       |
| PSG Stable *                      | 9.18%  | 9.89%                       | 8.41%                       |
| Momentum Enhanced Factor 4        | 10.95% | 9.86%                       | 8.97%                       |
| Allan Gray Stable *               | 8.20%  | 9.50%                       | 8.50%                       |
| 10X Defensive                     | 10.90% | 9.50%                       | 8.20%                       |
| Sanlam Stable Bonus               | 10.50% | 8.70%                       | 7.90%                       |
| Foord Conservative *              | 7.70%  | 8.60%                       | 9.20%                       |
| Coronation Balanced Defensive *   | 9.50%  | 8.30%                       | 8.20%                       |
| Liberty Stable Growth             | 7.76%  | 7.36%                       | 7.87%                       |

<sup>\*</sup> denotes a unit trust and therefore returns are net of costs.



## Moderate - Aggressive

| PORTFOLIO                     | 1 year | <b>3-years</b> (Annualised) | <b>5-years</b> (Annualised) |
|-------------------------------|--------|-----------------------------|-----------------------------|
| Momentum Enhanced Factor 7    | 11.69% | 11.52%                      | 9.79%                       |
| Allan Gray Balanced *         | 9.40%  | 11.40%                      | 10.30%                      |
| Destiny Market Enhanced       | 13.06% | 11.36%                      | 11.57%                      |
| Destiny Moderate              | 13.09% | 11.12%                      | 11.13%                      |
| Alexforbes Performer          | 11.42% | 10.99%                      | 11.41%                      |
| Sygnia Skeleton 70            | 12.00% | 10.80%                      | 10.90%                      |
| 10X Moderate                  | 11.20% | 10.70%                      | 9.20%                       |
| Liberty Single Manager Growth | 10.75% | 10.62%                      | 9.43%                       |
| Fairtree Balanced *           | 11.98% | 9.91%                       | 13.37%                      |
| Discovery Life Balanced       | 10.50% | 9.52%                       | 10.07%                      |
| Coronation Balanced Plus *    | 9.70%  | 9.10%                       | 10.30%                      |
| Foord Balanced *              | 6.50%  | 8.90%                       | 9.30%                       |
| Ninety One Managed *          | 8.00%  | 7.30%                       | 8.50%                       |

