

Industry Survey: August 2026

PORTFOLIO	Equity Allocation	1 year	3-years (Annualised)	5-years (Annualised)
Destiny Market Enhanced	>67%	14.15%	16.53%	13.73%
Destiny Moderate	50%-67%	14.13%	16.26%	13.46%
Destiny Conservative	40%-50%	13.86%	15.75%	12.97%
Alexforbes Performer	>67%	14.78%	15.72%	13.14%
Sygnia Skeleton Balanced 70 *	>67%	14.50%	15.50%	12.20%
Allan Gray Balanced *	>67%	14.20%	15.30%	14.00%
Momentum Enhanced Factor 7	>67%	12.44%	15.14%	13.01%
Fairtree Balanced *	>67%	13.33%	15.07%	12.32%
Destiny Defensive	<40%	13.08%	14.61%	12.06%
Discovery Life Balanced	>67%	11.20%	14.57%	11.53%
Alexforbes Conserver	40%-50%	11.74%	13.84%	11.93%
Liberty Single Manager Growth	>67%	11.54%	13.73%	11.46%
Momentum Enhanced Factor 4	<40%	11.69%	13.49%	11.44%
Sygnia Skeleton Balanced 40 *	40%-50%	12.00%	13.10%	10.70%
Liberty Core Conservative	40%-50%	11.34%	13.08%	10.87%
PSG Stable *	<40%	15.12%	13.02%	11.81%
Coronation Balanced Plus *	>67%	5.50%	12.70%	10.70%
Old Mutual Absolute Stable Growth *	50%-67%	15.90%	12.10%	11.10%
10X Your Future	>67%	8.50%	12.00%	11.10%
Sanlam Volatility Protection Strategy	50%-67%	12.40%	11.90%	10.50%
Allan Gray Stable *	40%-50%	9.60%	11.40%	10.80%
Sanlam Stable Bonus	<40%	12.20%	11.30%	10.00%
Foord Balanced *	>67%	8.70%	11.30%	10.40%
Coronation Balanced Defensive *	<40%	7.00%	11.00%	9.60%
10X Defensive	<40%	8.30%	11.00%	9.80%
Ninety One Managed *	50%-67%	8.10%	10.90%	8.80%
Foord Conservative *	50%-67%	7.10%	10.50%	9.60%

* Unit trust returns are net returns earned.