

Industry Survey: 31 October 2025

PORTFOLIO	1 year	3-years (Annualised)	5-years (Annualised)
Destiny Market Enhanced	22.76%	18.35%	17.60%
Destiny Moderate	21.84%	17.88%	16.86%
Fairtree Balanced *	21.30%	17.57%	15.94%
Coronation Balanced Plus *	24.30%	17.50%	16.10%
Sygnia Skeleton Balanced 70 *	21.10%	17.30%	14.60%
Destiny Conservative	20.79%	17.19%	15.81%
Momentum Enhanced Factor 7	20.21%	17.15%	16.72%
Alexforbes Performer	22.29%	16.97%	16.25%
Liberty Single Manager Growth	21.00%	16.79%	15.67%
Discovery Life Balanced	22.93%	16.41%	15.78%
Destiny Defensive	18.46%	15.80%	13.91%
Allan Gray Balanced *	22.80%	15.70%	16.40%
Liberty Core Conservative	18.66%	15.36%	13.54%
Alexforbes Conserver	18.12%	15.35%	13.90%
Foord Balanced *	17.30%	15.10%	13.10%
Momentum Enhanced Factor 4	17.69%	14.87%	14.09%
Sygnia Skeleton Balanced 40 *	16.40%	14.50%	12.00%
10X Moderate	15.80%	14.40%	14.40%
Coronation Balanced Defensive *	18.40%	14.40%	12.10%
Foord Conservative *	14.30%	13.70%	11.80%
PSG Stable *	15.90%	13.08%	14.50%
10X Defensive	13.30%	12.60%	11.70%
Sanlam Volatility Protection Strategy	13.60%	11.90%	11.00%
Ninety One Managed *	20.40%	11.80%	11.30%
Allan Gray Stable *	14.70%	11.60%	12.10%
Sanlam Stable Bonus	11.30%	10.60%	9.20%
Old Mutual Absolute Stable Growth *	10.80%	10.30%	10.30%

* Unit trust returns are net returns earned.

Allocation to equities

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