

Industry Survey: 30 June 2025

PORTFOLIO	1 year	3-years (Annualised)	5-years (Annualised)
Coronation Balanced Plus *	22.20%	16.70%	14.50%
Destiny Market Enhanced	19.73%	16.32%	15.44%
Destiny Moderate	19.15%	15.98%	14.83%
Momentum Enhanced Factor 7	17.97%	15.71%	14.70%
Destiny Conservative	18.21%	15.39%	13.92%
Allan Gray Balanced *	20.10%	15.20%	14.20%
Alexforbes Performer	17.24%	15.03%	14.00%
Liberty Single Manager Growth	16.86%	14.95%	13.38%
Sygnia Skeleton 70	16.70%	14.90%	12.30%
Fairtree Balanced *	16.83%	14.73%	14.47%
Destiny Defensive	16.48%	14.34%	12.38%
Discovery Life Balanced	17.74%	14.32%	13.49%
Alexforbes Conserver	16.33%	13.99%	12.35%
Momentum Enhanced Factor 4	15.86%	13.63%	12.51%
Coronation Balanced Defensive *	16.50%	13.60%	10.90%
10X Moderate	13.90%	13.50%	12.30%
Sygnia Skeleton 40	14.10%	12.90%	10.60%
Foord Balanced *	15.30%	12.80%	10.60%
Foord Conservative *	14.40%	12.40%	9.80%
PSG Stable *	14.94%	12.29%	13.11%
10X Defensive	12.60%	12.00%	10.20%
Allan Gray Stable *	15.20%	11.90%	10.90%
Ninety One Managed *	16.10%	11.70%	9.80%
Sanlam Volatility Protection Strategy	12.20%	10.90%	10.10%
Sanlam Stable Bonus	11.10%	9.90%	9.00%
Old Mutual Absolute Stable Growth *	10.50%	9.70%	9.90%

* Unit trust returns are net returns earned.

Allocation to equities

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