

Industry Survey: 31 March 2025

PORTFOLIO	1 year	3-years (Annualised)	5-years (Annualised)
Allan Gray Balanced *	12.70%	11.30%	15.50%
Destiny Market Enhanced	15.75%	11.28%	17.64%
Destiny Moderate	15.59%	11.28%	16.79%
Destiny Conservative	14.92%	11.10%	15.53%
Alexforbes Conserver	15.11%	11.09%	13.03%
Momentum Enhanced Factor 7	13.99%	10.96%	16.17%
Destiny Defensive	13.75%	10.93%	13.41%
Foord Conservative *	14.00%	10.70%	11.70%
Alexforbes Performer	13.79%	10.64%	15.33%
Fairtree Balanced *	15.31%	10.56%	18.05%
Liberty Single Manager Growth	14.47%	10.26%	14.74%
Momentum Enhanced Factor 4	13.04%	10.24%	13.42%
Sygnia Skeleton 70	12.70%	10.20%	14.70%
10X Moderate	13.30%	10.20%	13.80%
Foord Balanced *	13.60%	10.10%	12.60%
Allan Gray Stable *	11.40%	10.10%	12.10%
10X Defensive	13.00%	10.00%	10.90%
Coronation Balanced Defensive *	10.80%	10.00%	11.70%
Sygnia Skeleton 40	11.50%	9.80%	12.20%
Coronation Balanced Plus *	12.40%	9.70%	15.30%
Old Mutual Absolute Stable Growth *	10.60%	9.70%	8.30%
Sanlam Stable Bonus	11.20%	9.50%	8.50%
PSG Stable *	13.12%	9.13%	13.91%
Discovery Life Balanced	13.73%	8.63%	14.53%
Liberty Stable Growth	14.32%	8.27%	13.09%
Ninety One Managed *	8.50%	7.70%	8.90%

* Unit trust returns are net returns earned.

Allocation to equities

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