

Industry Survey: 31 May 2025

PORTFOLIO	1 year	3-years (Annualised)	5-years (Annualised)
Destiny Market Enhanced	19.21%	13.78%	16.01%
Destiny Moderate	18.86%	13.56%	15.28%
Coronation Balanced Plus *	19.10%	13.40%	14.40%
Momentum Enhanced Factor 7	17.65%	13.34%	15.04%
Destiny Conservative	18.10%	13.21%	14.23%
Allan Gray Balanced *	17.20%	12.80%	14.50%
Liberty Single Manager Growth	18.28%	12.67%	13.76%
Alexforbes Performer	16.66%	12.57%	14.18%
Destiny Defensive	16.52%	12.53%	12.52%
Sygnia Skeleton 70	16.30%	12.50%	13.40%
Alexforbes Conserver	16.91%	12.32%	12.36%
Fairtree Balanced *	15.84%	12.31%	14.86%
Momentum Enhanced Factor 4	15.81%	11.85%	12.57%
Coronation Balanced Defensive *	15.10%	11.70%	10.80%
Discovery Life Balanced	18.40%	11.65%	13.51%
Foord Conservative *	14.20%	11.50%	10.10%
Foord Balanced *	13.50%	11.40%	11.00%
Sygnia Skeleton 40	13.90%	11.20%	11.20%
Old Mutual Absolute Stable Growth *	11.60%	10.70%	10.80%
Allan Gray Stable *	14.00%	10.60%	11.20%
Ninety One Managed *	14.30%	10.40%	9.50%
Sanlam Volatility Protection Strategy	12.30%	10.10%	10.10%
PSG Stable *	13.87%	9.98%	12.97%
Liberty Stable Growth	15.00%	9.82%	11.68%
Sanlam Stable Bonus	11.20%	9.70%	8.80%

* Unit trust returns are net returns earned.

Allocation to equities

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