

Industry Survey: February 2026

PORTFOLIO	1 year	3-years (Annualised)	5-years (Annualised)
Fairtree Balanced *	31.80%	17.73%	14.33%
Destiny Market Enhanced	29.05%	17.68%	15.12%
Destiny Moderate	27.65%	17.28%	14.74%
Destiny Conservative	25.64%	16.66%	14.01%
Momentum Enhanced Factor 7	25.60%	16.65%	14.81%
Alexforbes Performer	26.49%	16.61%	14.59%
Sygnia Skeleton Balanced 70 *	26.50%	16.20%	13.10%
Discovery Life Balanced	28.54%	16.09%	13.54%
Allan Gray Balanced *	30.50%	16.00%	15.00%
Liberty Single Manager Growth	23.89%	15.42%	13.21%
Destiny Defensive	21.62%	15.33%	12.76%
Momentum Enhanced Factor 4	21.03%	14.73%	12.78%
Alexforbes Conserver	20.42%	14.51%	12.99%
Liberty Core Conservative	21.50%	14.50%	12.05%
10X Moderate	19.10%	14.00%	12.60%
Sygnia Skeleton Balanced 40 *	18.40%	13.50%	11.30%
Coronation Balanced Plus *	17.20%	13.40%	11.80%
PSG Stable *	24.54%	13.07%	13.15%
10X Defensive	15.90%	12.80%	11.10%
Sanlam Volatility Protection Strategy	15.60%	12.40%	10.70%
Foord Balanced *	20.50%	12.20%	11.60%
Ninety One Managed *	19.90%	12.10%	9.80%
Allan Gray Stable *	18.00%	12.00%	11.30%
Coronation Balanced Defensive *	12.70%	11.70%	9.90%
Foord Conservative *	16.90%	11.50%	10.70%
Old Mutual Absolute Stable Growth *	13.70%	11.40%	10.90%
Sanlam Stable Bonus	11.90%	11.20%	9.60%

* Unit trust returns are net returns earned.

Allocation to equities

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