

Industry Survey: June 2026

PORTFOLIO	1 year	3-years (Annualised)	5-years (Annualised)
Destiny Market Enhanced	15.00%	15.90%	13.71%
Destiny Moderate	15.14%	15.77%	13.49%
Destiny Conservative	15.27%	15.48%	13.05%
Alexforbes Performer	16.80%	15.14%	13.37%
Allan Gray Balanced *	15.20%	14.80%	13.80%
Destiny Defensive	14.74%	14.63%	12.19%
Momentum Enhanced Factor 7	13.83%	14.47%	13.24%
Sygnia Skeleton Balanced 70 *	15.30%	14.40%	12.10%
Alexforbes Conserver	13.56%	13.73%	12.21%
Momentum Enhanced Factor 4	13.88%	13.55%	11.84%
Discovery Life Balanced	12.32%	13.48%	11.68%
PSG Stable *	16.23%	13.41%	12.14%
Fairtree Balanced *	11.26%	13.33%	11.53%
Liberty Core Conservative	13.25%	12.93%	11.00%
Sygnia Skeleton Balanced 40 *	13.70%	12.90%	10.90%
Liberty Single Manager Growth	11.82%	12.66%	11.55%
Coronation Balanced Plus *	6.60%	12.60%	11.10%
Old Mutual Absolute Stable Growth *	16.30%	12.20%	11.10%
Sanlam Volatility Protection Strategy	13.10%	11.80%	10.50%
10X Your Future	10.50%	11.80%	11.70%
Allan Gray Stable *	11.80%	11.70%	11.10%
Coronation Balanced Defensive *	8.40%	11.40%	9.90%
Sanlam Stable Bonus	12.30%	11.30%	9.90%
10X Defensive	10.10%	11.20%	10.20%
Foord Balanced *	8.30%	10.00%	10.00%
Ninety One Managed *	5.90%	9.90%	8.70%
Foord Conservative *	7.90%	9.90%	9.60%

* Unit trust returns are net returns earned.

Allocation to equities

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