

# Industry Survey: 31 August 2025

PORTFOLIO	1 year	3-years (Annualised)	5-years (Annualised)
Destiny Market Enhanced	18.57%	<b>16.60%</b>	15.35%
Destiny Moderate	17.91%	<b>16.19%</b>	14.78%
Allan Gray Balanced *	20.20%	<b>16.00%</b>	14.90%
Momentum Enhanced Factor 7	17.54%	<b>16.00%</b>	14.65%
Coronation Balanced Plus *	21.80%	<b>15.80%</b>	13.90%
Destiny Conservative	17.05%	<b>15.57%</b>	13.39%
Alexforbes Performer	18.34%	<b>15.46%</b>	14.23%
Fairtree Balanced *	17.97%	<b>15.24%</b>	13.57%
Sygnia Skeleton 70	17.80%	<b>15.20%</b>	12.50%
Discovery Life Balanced	18.99%	<b>14.78%</b>	13.29%
Liberty Single Manager Growth	16.32%	<b>14.48%</b>	12.81%
Destiny Defensive	15.36%	<b>14.43%</b>	12.46%
Alexforbes Conserver	15.53%	<b>14.04%</b>	12.56%
Momentum Enhanced Factor 4	15.12%	<b>13.76%</b>	12.54%
10X Moderate	12.70%	<b>13.60%</b>	12.50%
Liberty Core Conservative	14.25%	<b>13.23%</b>	11.21%
Coronation Balanced Defensive *	15.90%	<b>13.10%</b>	10.70%
Foord Balanced *	15.60%	<b>13.10%</b>	10.90%
Sygnia Skeleton 40	14.40%	<b>13.00%</b>	10.70%
Allan Gray Stable *	14.40%	<b>12.40%</b>	11.40%
Foord Conservative *	13.90%	<b>12.30%</b>	10.00%
PSG Stable *	13.05%	<b>12.20%</b>	12.89%
10X Defensive	10.90%	<b>12.00%</b>	10.50%
Sanlam Volatility Protection Strategy	12.20%	<b>11.30%</b>	10.20%
Ninety One Managed *	15.60%	<b>11.20%</b>	9.10%
Sanlam Stable Bonus	11.20%	<b>10.30%</b>	9.10%
Old Mutual Absolute Stable Growth *	10.60%	<b>10.00%</b>	10.10%

\* Unit trust returns are net returns earned.

Allocation to equities

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