

Industry Survey: 30 November 2025

PORTFOLIO	1 year	3-years (Annualised)	5-years (Annualised)
Destiny Market Enhanced	22.45%	16.71%	16.03%
Destiny Moderate	21.49%	16.42%	15.47%
Destiny Conservative	20.38%	16.10%	14.63%
Alexforbes Performer	21.14%	15.86%	14.97%
Momentum Enhanced Factor 7	19.10%	15.65%	15.38%
Coronation Balanced Plus *	18.50%	15.50%	13.90%
Sygnia Skeleton Balanced 70 *	20.20%	15.40%	13.50%
Liberty Single Manager Growth	18.97%	15.32%	14.38%
Destiny Defensive	17.93%	15.15%	13.11%
Allan Gray Balanced *	22.20%	15.10%	15.10%
Fairtree Balanced *	22.35%	14.91%	14.69%
Liberty Core Conservative	17.10%	14.53%	12.80%
Momentum Enhanced Factor 4	16.77%	14.32%	13.22%
Alexforbes Conserver	17.18%	14.26%	13.16%
Foord Balanced *	17.10%	13.50%	11.60%
Sygnia Skeleton Balanced 40 *	15.30%	13.50%	11.40%
Coronation Balanced Defensive *	14.80%	13.40%	11.00%
Foord Conservative *	14.10%	12.90%	10.70%
PSG Stable *	17.39%	12.56%	13.08%
Allan Gray Stable *	14.90%	12.20%	11.60%
Sanlam Volatility Protection Strategy	13.60%	12.00%	10.50%
Ninety One Managed *	15.70%	11.40%	10.20%
Sanlam Stable Bonus	11.50%	10.80%	9.30%
Old Mutual Absolute Stable Growth *	11.00%	10.50%	10.40%

* Unit trust returns are net returns earned.

Allocation to equities

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