

# Industry Survey: 30 November 2025

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

\* Unit trust returns are net returns earned.

Allocation to equities

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