

Industry Survey: 30 April 2025

PORTFOLIO	1 year	3-years (Annualised)	5-years (Annualised)
Destiny Market Enhanced	17.71%	12.66%	15.37%
Destiny Moderate	17.47%	12.56%	14.74%
Momentum Enhanced Factor 7	17.33%	12.54%	14.54%
Destiny Conservative	16.74%	12.22%	13.80%
Liberty Single Manager Growth	18.12%	12.21%	13.34%
Alexforbes Conserver	16.14%	12.06%	12.29%
Alexforbes Performer	15.74%	11.92%	13.65%
Allan Gray Balanced *	15.50%	11.80%	13.70%
Destiny Defensive	15.35%	11.74%	12.29%
Coronation Balanced Plus *	15.40%	11.40%	13.70%
Fairtree Balanced *	14.86%	11.35%	14.79%
Momentum Enhanced Factor 4	15.41%	11.29%	12.38%
10X Moderate	14.80%	11.20%	12.40%
Foord Conservative *	14.00%	11.10%	10.00%
Sygnia Skeleton 70	15.00%	11.00%	13.00%
Coronation Balanced Defensive *	13.40%	10.90%	10.70%
Discovery Life Balanced	16.40%	10.88%	12.83%
Old Mutual Absolute Stable Growth *	11.70%	10.80%	10.70%
Foord Balanced *	13.10%	10.60%	10.60%
10X Defensive	13.70%	10.50%	10.10%
Allan Gray Stable *	13.80%	10.20%	11.00%
Sygnia Skeleton 40	13.00%	10.00%	11.00%
Sanlam Volatility Protection Strategy	12.10%	9.80%	9.90%
PSG Stable *	13.37%	9.74%	12.97%
Sanlam Stable Bonus	11.20%	9.60%	8.70%
Ninety One Managed *	13.00%	9.20%	8.80%
Liberty Stable Growth	14.39%	8.37%	11.67%

* Unit trust returns are net returns earned.

Allocation to equities

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