

Industry Survey: March 2026

PORTFOLIO	1 year	3-years (Annualised)	5-years (Annualised)
Allan Gray Balanced *	24.30%	15.80%	13.90%
Destiny Market Enhanced	20.62%	15.67%	13.23%
Destiny Moderate	19.74%	15.29%	12.99%
Alexforbes Performer	20.57%	15.20%	13.28%
Destiny Conservative	18.68%	14.80%	12.55%
Momentum Enhanced Factor 7	16.76%	14.35%	12.77%
Sygnia Skeleton Balanced 70 *	19.30%	14.20%	11.50%
Fairtree Balanced *	18.94%	14.07%	11.56%
Destiny Defensive	16.35%	13.74%	11.73%
Liberty Single Manager Growth	16.23%	13.38%	11.58%
Discovery Life Balanced	19.26%	13.32%	11.58%
Alexforbes Conserver	15.91%	13.28%	12.07%
Momentum Enhanced Factor 4	14.42%	12.78%	11.39%
10X Moderate	13.40%	12.70%	11.60%
Old Mutual Absolute Stable Growth *	15.00%	12.50%	11.90%
PSG Stable *	19.57%	12.49%	12.42%
Liberty Core Conservative	15.01%	12.48%	10.81%
Coronation Balanced Plus *	12.40%	12.40%	10.30%
Sygnia Skeleton Balanced 40 *	14.40%	12.10%	10.40%
Allan Gray Stable *	15.10%	12.10%	11.10%
Sanlam Volatility Protection Strategy	14.10%	11.60%	10.20%
Ninety One Managed *	17.00%	11.60%	9.10%
10X Defensive	11.30%	11.50%	10.30%
Sanlam Stable Bonus	12.00%	11.20%	9.70%
Foord Balanced *	13.80%	10.70%	10.70%
Coronation Balanced Defensive *	9.70%	10.70%	9.10%
Foord Conservative *	12.10%	10.40%	10.20%

* Unit trust returns are net returns earned.

Allocation to equities

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