

Industry Survey: 31 January 2026

PORTFOLIO	1 year	3-years (Annualised)	5-years (Annualised)
Destiny Market Enhanced	25.01%	15.92%	15.23%
Destiny Moderate	23.93%	15.72%	14.80%
Fairtree Balanced *	28.56%	15.55%	14.47%
Alexforbes Performer	22.76%	15.46%	14.62%
Destiny Conservative	22.48%	15.38%	14.05%
Momentum Enhanced Factor 7	20.75%	15.12%	14.88%
Allan Gray Balanced *	26.10%	14.90%	14.70%
Sygnia Skeleton Balanced 70 *	21.60%	14.80%	13.00%
Discovery Life Balanced	23.28%	14.64%	13.75%
Liberty Single Manager Growth	20.91%	14.58%	13.53%
Destiny Defensive	19.30%	14.47%	12.71%
Liberty Core Conservative	19.35%	13.88%	12.15%
Alexforbes Conserver	18.33%	13.80%	13.01%
Momentum Enhanced Factor 4	17.65%	13.78%	12.78%
Coronation Balanced Plus *	16.80%	13.40%	12.60%
10X Moderate	15.80%	12.80%	12.50%
PSG Stable *	21.93%	12.75%	13.31%
Sygnia Skeleton Balanced 40 *	15.30%	12.70%	11.00%
Sanlam Volatility Protection Strategy	14.10%	11.90%	10.60%
10X Defensive	13.70%	11.90%	11.00%
Foord Balanced *	19.70%	11.80%	11.50%
Ninety One Managed *	17.60%	11.80%	10.30%
Coronation Balanced Defensive *	12.40%	11.70%	10.30%
Allan Gray Stable *	15.10%	11.50%	11.10%
Old Mutual Absolute Stable Growth *	13.50%	11.30%	10.90%
Foord Conservative *	15.50%	11.10%	10.50%
Sanlam Stable Bonus	11.70%	11.10%	9.50%

* Unit trust returns are net returns earned.

Allocation to equities

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