

Industry Survey: September 2026

PORTFOLIO	Equity Allocation	1 year	3-years (Annualised)	5-years (Annualised)
Destiny Market Enhanced	>67%	9.03%	16.83%	13.47%
Destiny Moderate	50%-67%	9.46%	16.56%	13.27%
Destiny Global Enhanced	>67%	10.44%	16.47%	12.06%
Destiny Conservative	40%-50%	9.88%	16.13%	12.84%
Alexforbes Performer	>67%	9.39%	15.94%	12.63%
Sygnia Skeleton Balanced 70 *	>67%	8.60%	15.60%	11.80%
Momentum Enhanced Factor 7	>67%	6.72%	15.34%	12.49%
Destiny Defensive	<40%	10.44%	15.10%	12.04%
Discovery Life Balanced	>67%	4.21%	14.93%	11.18%
Fairtree Balanced *	>67%	4.86%	14.68%	12.55%
Allan Gray Balanced *	>67%	8.90%	14.60%	13.00%
Liberty Single Manager Growth	50%-67%	5.70%	14.52%	11.61%
Liberty Core Conservative	<40%	7.59%	14.40%	11.10%
Alexforbes Conserver	<40%	8.11%	14.04%	11.73%
Momentum Enhanced Factor 4	40%-50%	7.97%	13.80%	11.23%
Sygnia Skeleton Balanced 40 *	40%-50%	9.00%	13.50%	10.70%
PSG Stable *	<40%	12.07%	13.15%	11.32%
Coronation Balanced Plus *	>67%	-0.70%	13.10%	10.10%
Old Mutual Absolute Stable Growth *	50%-67%	16.20%	12.60%	11.50%
10X Your Future	>67%	3.40%	12.10%	10.70%
Sanlam Volatility Protection Strategy	50%-67%	10.60%	12.00%	10.20%
Allan Gray Stable *	40%-50%	8.40%	11.40%	10.40%
Sanlam Stable Bonus	40%-50%	12.10%	11.30%	10.10%
Coronation Balanced Defensive *	40%-50%	3.30%	11.30%	9.40%
10X Defensive	<40%	4.80%	11.10%	9.50%
Foord Balanced *	50%-67%	1.80%	10.90%	9.30%
Ninety One Managed *	50%-67%	0.80%	10.50%	7.40%
Foord Conservative *	50%-67%	2.20%	10.20%	8.90%

* Unit trust returns are net returns earned.