

Personal Super Performance Tables: 31 August 2021

TOP 50 PERSONAL SUPER – BALANCED INVESTMENT OPTIONS

Balanced investment options (diversified asset allocation with between 55% and 75% growth asset weighting)

Product & Investment Option Name	Segment	Public offer	Performance to 31 August 2021									
			1 year	Rank	3 years	Rank	5 years	Rank	7 years	Rank	10 years	Rank
UniSuper Personal Accounts - Sustainable Balanced	Industry Fund	Yes	17.8%	55	11.2%	1	10.4%	1	9.7%	1	10.4%	1
Australian Ethical Super Personal - Balanced (accumulation)	Retail Fund	Yes	19.8%	8	10.2%	2	9.0%	13	8.7%	7	8.8%	28
Australian Catholic Super Personal - Socially Responsible	Industry Fund	Yes	18.9%	21	10.0%	3	9.1%	12	7.7%	39	8.7%	30
UniSuper Personal Accounts - Balanced	Industry Fund	Yes	18.2%	44	9.8%	4	9.6%	5	9.2%	3	10.2%	3
VicSuper FutureSaver Personal - Socially Conscious	Industry Fund	Yes	17.4%	63	9.7%	5	9.4%	8	8.4%	17	10.3%	2
VicSuper FutureSaver Personal - Growth (MySuper)	Industry Fund	Yes	19.7%	9	9.5%	6	9.5%	6	8.6%	11	9.8%	8
Future Super - Renewables Plus Growth	Retail Fund	Yes	14.9%	98	9.4%	7						
HOSTPLUS Personal Super - SRI - Balanced	Industry Fund	Yes	22.2%	2	9.4%	8						
AustralianSuper Personal - Balanced	Industry Fund	Yes	18.9%	22	9.3%	9	10.0%	2	9.4%	2	10.1%	4
CareSuper Personal - Sustainable Balanced	Industry Fund	Yes	17.0%	71	9.1%	10	9.0%	14	8.4%	15	9.3%	14
AustralianSuper Personal - Indexed Diversified	Industry Fund	Yes	18.2%	43	9.1%	11	9.0%	17	7.9%	27	8.4%	40
Vision Personal Plan - Balanced Growth	Industry Fund	Yes	18.8%	24	9.1%	12	9.7%	4	8.7%	10	9.3%	16
Aware Super Personal - Growth	Industry Fund	Yes	19.3%	15	9.0%	13	9.7%	3	8.7%	9	9.5%	11
ESSSuper Accumulation Plan - Basic Growth	Government Fund	No	18.8%	23	8.9%	14						
HOSTPLUS Personal Super - Indexed Balanced	Industry Fund	Yes	19.0%	19	8.9%	15	9.4%	9	8.5%	13	10.0%	5
Virgin Money SPD - Enhanced Indexed Growth	Retail Fund	Yes	17.6%	56	8.8%	16						
GuildSuper Personal - MySuper Lifecycle Consolidating	Retail Fund	Yes	17.9%	52	8.8%	17	7.8%	53	6.9%	63		
MLC MKSF - BlackRock Global Allocation Fund	Retail Fund	Yes	14.0%	105	8.8%	18	7.8%	54	6.5%	71	7.6%	56
Cbus Personal Super - Growth (Cbus MySuper)	Industry Fund	Yes	18.1%	48	8.7%	19	9.5%	7	9.0%	4	9.9%	6
GuildSuper Personal - MyMix Balanced	Retail Fund	Yes	17.1%	69	8.7%	20	7.7%	55	6.9%	63	7.3%	59
FirstChoice WPS - First Sentier Diversified	Retail Fund	Yes	18.5%	33	8.7%	21	8.6%	25	7.9%	29	9.1%	21
HESTA Personal Super - Balanced Growth	Industry Fund	Yes	19.4%	11	8.7%	22	9.2%	10	8.4%	14	9.3%	13
NGS Super Personal - Indexed Growth	Industry Fund	Yes	19.0%	18	8.7%	23	8.7%	21	8.2%	21		
MLC WSS2 Super - Index Plus Balanced Portfolio	Retail Fund	Yes	18.7%	26	8.5%	24						
Virgin Money SPD - LifeStage Tracker 1959-1963	Retail Fund	Yes	16.6%	79	8.4%	25						
Prime Super - Personal (Prime Division) - MySuper	Industry Fund	Yes	18.3%	41	8.3%	26	9.0%	15	8.7%	8	9.4%	12
FirstChoice WPS - FirstChoice Wholesale Growth	Retail Fund	Yes	21.0%	4	8.3%	27	8.7%	23	7.8%	34	9.2%	18
Future Super - Balanced Impact	Retail Fund	Yes	13.4%	110	8.3%	28	7.5%	67				
FirstChoice WPS - FirstChoice Wholesale Multi-Index Growth	Retail Fund	Yes	24.7%	1	8.3%	29						
BUSS(Q) Premium - Premium Balanced Growth	Industry Fund	Yes	17.3%	64	8.2%	30	8.2%	38	8.4%	16	9.1%	20
Telstra Super Personal Plus - Balanced	Corporate Fund	Yes	20.8%	5	8.2%	31	8.6%	26	7.8%	32	9.3%	15
legalsuper Personal - Balanced Socially Responsible	Industry Fund	Yes	19.4%	12	8.2%	32	8.2%	40	7.0%	57	8.1%	48
AMG Personal - AMG MySuper	Retail Fund	Yes	19.1%	17	8.2%	33	7.5%	66	6.9%	65		
ESSSuper Accumulation Plan - Ethically Minded	Government Fund	No	18.7%	27	8.2%	34						
Colonial First State RSO - Diversified Option	Retail Fund	Yes	18.4%	37	8.2%	35	7.9%	46	7.1%	51	8.4%	38
MLC WSS2 Super - Horizon 4 Balanced Portfolio	Retail Fund	Yes	20.6%	6	8.2%	36	8.6%	24	7.8%	31		
Christian Super Personal - My Ethical Super	Industry Fund	Yes	18.4%	35	8.2%	37	7.9%	45	7.2%	46	8.3%	42
MLC MKSF - MLC Horizon 4 Balanced Portfolio	Retail Fund	Yes	19.9%	7	8.2%	38	8.3%	36	7.7%	38	8.6%	35
smartMonday DIRECT - Balanced Growth Index	Retail Fund	Yes	17.3%	66	8.2%	39	8.2%	39	7.6%	40	8.9%	26
legalsuper Personal - Balanced Index	Industry Fund	Yes	17.6%	58	8.1%	40	8.1%	42	7.8%	35		
Catholic Super Personal - Moderately Aggressive	Industry Fund	Yes	18.7%	25	8.1%	41	9.1%	11	8.9%	5	9.7%	9
ANZ Staff Super - Balanced Growth	Corporate Fund	No	16.6%	78	8.1%	42	8.3%	33			9.0%	24
AMP Flexible Super - Super Easy Balanced	Retail Fund	Yes	18.4%	34	8.0%	43	7.8%	52	7.4%	41	8.6%	33
Aware Super Personal Retirement Plan - Growth Plus	Industry Fund	Yes	18.6%	28	8.0%	44	8.3%	34	7.8%	30	9.8%	7
Aware Super Personal - Diversified Socially Responsible	Industry Fund	Yes	16.4%	81	8.0%	45	8.3%	37	7.2%	43	8.6%	32
Media Super Personal - Balanced	Industry Fund	Yes	17.0%	74	8.0%	46	9.0%	16	8.3%	19	8.9%	25
NGS Super Personal - Diversified (MySuper)	Industry Fund	Yes	17.9%	51	8.0%	47	8.8%	20	8.1%	24	8.6%	34
legalsuper Personal - Balanced	Industry Fund	Yes	17.2%	68	7.9%	48	8.4%	28	7.9%	26	9.0%	23
AMG Personal - AMG Balanced	Retail Fund	Yes	16.5%	80	7.8%	49	7.5%	65	7.1%	50	8.3%	41
Spirit Super Personal - Balanced (MySuper)	Industry Fund	Yes	17.5%	59	7.8%	50	8.5%	27	8.5%	12	8.4%	37
Investment Options			127		121		110		93		76	
Maximum			24.7%		11.2%		10.4%		9.7%		10.4%	
Quartile 1			18.5%		8.2%		8.4%		8.1%		9.2%	
Median			17.3%		7.6%		7.7%		7.2%		8.4%	
Quartile 3			15.3%		6.7%		6.9%		6.5%		7.4%	
Minimum			10.0%		3.0%		3.6%		3.9%		5.3%	

Table is sorted by 3 year performance. Performance figures are net of investment, management, administration fees and the indirect cost ratio. In the case of dollar-based member fees, Rainmaker assumes a \$50,000 account balance. Your achieved performance may vary due to additional costs such as insurance; ask your fund for details. Public offer funds are open to all types of members. Limited public offer means new members may join provided they satisfy certain eligibility conditions. Past performance is no guarantee of future results.