

Personal Super Performance Tables: 31 March 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 March 2021									
			1 year	Rank	3 years	Rank	5 years	Rank	7 years	Rank	10 years	Rank
UniSuper Personal Accounts - Sustainable Balanced	Industry Fund	Ltd	20.0%	41	10.0%	1	9.4%	2	8.7%	3	8.6%	4
Suncorp Brighter Personal - Multi-Manager Growth Fund	Retail Fund	Yes	9.0%	152	9.7%	2						
UniSuper Personal Accounts - Balanced	Industry Fund	Ltd	22.6%	12	9.1%	3	9.2%	4	8.7%	2	8.7%	3
Australian Ethical Super Personal - Balanced (accumulation)	Retail Fund	Yes	19.3%	60	8.9%	4	8.4%	17	7.9%	11	7.2%	36
Australian Catholic Super Personal - Socially Responsible	Industry Fund	Yes	17.3%	100	8.9%	5	8.0%	29	6.9%	42	7.2%	33
AustralianSuper Personal - Balanced	Industry Fund	Yes	21.7%	24	8.6%	6	9.5%	1	8.8%	1	8.8%	1
MLC MKSF - BlackRock Global Allocation Fund	Retail Fund	Yes	29.8%	1	8.5%	7	7.8%	38	6.6%	54	6.7%	48
HOSTPLUS Personal Super - Indexed Balanced	Industry Fund	Yes	22.7%	11	8.5%	8	8.7%	11	7.8%	15	8.3%	7
CareSuper Personal - Sustainable Balanced	Industry Fund	Yes	18.2%	80	8.4%	9	8.4%	16	7.7%	21	8.0%	16
AustralianSuper Personal - Indexed Diversified	Industry Fund	Yes	20.1%	39	8.2%	10	8.3%	19	7.1%	35		
Vision Personal Plan - Balanced Growth	Industry Fund	Yes	20.7%	32	8.2%	11	8.8%	7	7.8%	14	8.1%	14
Suncorp Brighter Personal - BlackRock Tactical Growth Fund	Retail Fund	Yes	20.2%	38	8.1%	12						
ESSSuper Accumulation Plan - Basic Growth	Government Fund	No	19.5%	54	8.1%	13						
Virgin Money SPD - Enhanced Indexed Growth	Retail Fund	Yes	19.9%	42	8.1%	14						
HOSTPLUS Personal Super - SRI - Balanced	Industry Fund	Yes	23.8%	8	7.9%	15						
Aware Super Personal - Growth	Industry Fund	Yes	18.4%	74	7.9%	16	9.0%	5	7.8%	13	8.1%	11
MLC WSS2 Super - Index Plus Balanced Portfolio	Retail Fund	Yes	22.6%	13	7.9%	17						
Suncorp Brighter Personal - Lifestage Fund 1975-1980	Retail Fund	Yes	23.6%	9	7.9%	18						
VicSuper FutureSaver Personal - Growth (MySuper)	Industry Fund	Yes	17.8%	88	7.9%	19	8.8%	9	8.0%	10	8.1%	10
Cbus Personal Super - Growth (Cbus MySuper)	Industry Fund	Yes	20.8%	30	7.9%	20	9.0%	6	8.5%	4	8.8%	2
FirstChoice WPS - First Sentier Diversified	Retail Fund	Yes	17.7%	90	7.8%	21	7.8%	36	7.1%	36	7.4%	28
VicSuper FutureSaver Personal - Socially Conscious	Industry Fund	Yes	13.1%	138	7.7%	22	9.3%	3	7.7%	20	8.3%	5
Virgin Money SPD - LifeStage Tracker 1959-1963	Retail Fund	Yes	17.8%	84	7.7%	23						
smartMonday DIRECT - Balanced Growth Index	Retail Fund	Yes	21.5%	27	7.7%	24	7.6%	46	7.0%	40	7.4%	29
Future Super - Balanced Impact	Retail Fund	Yes	13.6%	136	7.7%	25	7.0%	74				
FirstChoice WPS - FirstChoice Wholesale Growth	Retail Fund	Yes	25.7%	5	7.6%	26	8.2%	20	7.4%	29	7.6%	23
NGS Super Personal - Indexed Growth	Industry Fund	Yes	20.6%	34	7.5%	27	7.9%	33	7.5%	24		
GuildSuper Personal - MyMix Balanced	Retail Fund	Yes	18.9%	69	7.5%	28	6.9%	76	6.2%	66	6.3%	54
SES - Suncorp Lifestage Fund 1975-79	Retail Fund	Yes	23.2%	10	7.5%	29	7.2%	59				
Media Super Personal - Balanced	Industry Fund	Yes	17.3%	99	7.5%	30	8.6%	12	7.7%	18	7.7%	22
IOOF ESPS - IOOF Balanced Investor Trust	Retail Fund	Yes	17.5%	96	7.5%	31	7.9%	34				
AMG Personal - AMG Balanced	Retail Fund	Yes	19.6%	53	7.5%	32	7.2%	58	6.8%	46	7.1%	39
legalsuper Personal - Balanced Index	Industry Fund	Yes	18.2%	79	7.5%	33	7.4%	48	7.0%	38		
FirstChoice WPS - FirstChoice Wholesale Multi-Index Growth	Retail Fund	Yes	27.7%	2	7.4%	34						
Prime Super - Personal (Prime Division) - MySuper	Industry Fund	Yes	17.8%	86	7.4%	35	8.8%	10	8.1%	7	8.2%	9
Generations PS - Generations Index Balanced	Retail Fund	Yes	22.1%	20	7.4%	36	7.4%	49	6.7%	52		
Suncorp Brighter Personal - Lifestage Fund 1970-1975	Retail Fund	Yes	22.0%	23	7.4%	37						
GuildSuper Personal - MySuper Lifecycle Consolidating	Retail Fund	Yes	19.1%	64	7.4%	38	6.9%	76	6.1%	69		
MLC WSS2 Super - Horizon 4 Balanced Portfolio	Retail Fund	Yes	24.1%	7	7.4%	39	8.0%	27	7.2%	34		
Equip MyFuture Personal - Balanced Growth	Industry Fund	Yes	19.1%	65	7.4%	40	8.5%	14	7.8%	16	8.1%	12
Vision Personal Plan - Sustainable Balanced	Industry Fund	Yes	22.1%	22	7.4%	41						
HESTA Personal Super - Balanced Growth	Industry Fund	Yes	20.3%	37	7.3%	42	8.4%	15	7.7%	19	8.0%	15
MLC MKSF - MLC Horizon 4 Balanced Portfolio	Retail Fund	Yes	20.0%	40	7.3%	43	7.6%	45	7.0%	39	7.2%	37
Suncorp Brighter Personal - Universal Growth Fund	Retail Fund	Yes	20.4%	36	7.2%	44						
AMP Flexible Super - Super Easy Balanced	Retail Fund	Yes	19.8%	46	7.2%	45	7.1%	62	6.8%	49	7.2%	35
Aware Super Personal Retirement Plan - Growth Plus	Industry Fund	Yes	18.0%	82	7.2%	46	7.6%	44	7.4%	28		
AMP Flexible Super - RIL Balanced	Retail Fund	Yes	22.2%	19	7.2%	47	7.0%	70	6.1%	68	6.6%	51
Equip MyFuture Personal - Equip MySuper	Industry Fund	Yes	19.0%	67	7.2%	48	8.0%	25	7.4%	27		
Colonial First State RSO - Diversified Option	Retail Fund	Yes	17.6%	94	7.2%	49	7.1%	63	6.3%	62	6.7%	49
Spirit Super Personal - Balanced (MySuper)	Industry Fund	Yes	17.8%	85	7.1%	50	8.1%	24	8.0%	9	7.3%	31
Investment Options			154		144		125		98		78	
Maximum			29.8%		10.0%		9.5%		8.8%		8.8%	
Quartile 1			20.0%		7.4%		7.9%		7.4%		7.8%	
Median			18.3%		6.8%		7.1%		6.7%		7.1%	
Quartile 3			15.4%		6.0%		6.5%		5.9%		6.1%	
Minimum			0.5%		1.6%		3.3%		3.7%		4.1%	

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.