

Retirement Products Performance Tables: 31 March 2021

TOP 50 RETIREMENT PRODUCTS – BALANCED INVESTMENT OPTIONS

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

Product & Investment Option Name	Segment	Can anyone join?	Performance to 31 March 2021									
			1 year	Rank	3 years	Rank	5 years	Rank	7 years	Rank	10 years	Rank
UniSuper Pension - Sustainable Balanced	Industry Fund	Ltd	22.6%	36	11.4%	1	10.6%	1	9.9%	1	9.8%	4
Suncorp Brighter Pension - Multi-Manager Growth Fund	Retail Fund	Yes	21.7%	52	10.8%	2						
Future Super - Balanced Growth Pension	Retail Fund	Yes	19.2%	92	10.4%	3	8.4%	48				
UniSuper Pension - Balanced	Industry Fund	Ltd	25.4%	10	10.4%	4	10.4%	3	9.8%	2	9.9%	2
Australian Catholic Super RetireChoice - Socially Responsible	Industry Fund	Yes	19.1%	94	10.0%	5	9.1%	25	8.0%	36	8.5%	26
Sunsuper Income Account - Balanced Index	Industry Fund	Yes	25.0%	11	9.6%	6	9.4%	14	8.9%	12	9.1%	9
HOSTPLUS Pension - Indexed Balanced	Industry Fund	Yes	25.8%	8	9.5%	7	9.8%	8	8.6%	19	9.1%	10
ESSSuper Income Streams - Basic Growth	Government Fund	No	22.9%	30	9.4%	8						
AustralianSuper Choice Income - Balanced	Industry Fund	Yes	24.1%	18	9.4%	9	10.4%	2	9.8%	3	9.8%	5
AustralianSuper Choice Income - Indexed Diversified	Industry Fund	Yes	22.8%	33	9.3%	10	9.4%	13	8.2%	24		
MLC MKPF - BlackRock Global Allocation Fund	Retail Fund	Yes	32.4%	1	9.2%	11	8.4%	49	7.2%	62	7.3%	68
CareSuper Pension - Sustainable Balanced	Industry Fund	Yes	20.2%	76	9.1%	12	9.1%	20	8.5%	20	9.0%	11
Vision Income Streams - Sustainable Balanced	Industry Fund	Yes	24.8%	12	9.1%	13						
Cbus Super Income Stream - Growth (Cbus Choice)	Industry Fund	Yes	23.8%	21	9.0%	14	10.2%	5	9.7%	4	9.9%	3
HOSTPLUS Pension - SRI - Balanced	Industry Fund	Yes	27.3%	5	8.9%	15						
smartMonday PENSION - Balanced Growth Index	Retail Fund	Yes	23.3%	26	8.9%	16	8.8%	33	8.1%	35	8.6%	24
FirstChoice WP - First Sentier Diversified	Retail Fund	Yes	20.0%	83	8.6%	17	8.7%	39	7.8%	40	8.3%	36
Aware Super Pension - Growth	Industry Fund	Yes	19.8%	86	8.6%	18	9.8%	9	8.6%	18	9.0%	12
VicSuper Flexible Income - Growth	Industry Fund	Yes	19.2%	93	8.5%	19	9.6%	11	8.6%	16	9.0%	14
QSuper Income - QSuper Aggressive	Government Fund	Yes	16.5%	115	8.5%	20	9.8%	7	9.6%	5	10.1%	1
FirstChoice WP - FirstChoice Wholesale Growth	Retail Fund	Yes	29.2%	4	8.5%	21	9.1%	23	8.2%	26	8.5%	28
Mercer AP - Mercer Socially Responsible Growth	Retail Fund	Yes	24.2%	16	8.5%	22	8.5%	46	7.6%	51	8.1%	43
Prime Super Super Income Stream - Balanced	Industry Fund	Yes	20.1%	80	8.4%	23	10.2%	4	9.5%	6	9.6%	6
legalsuper Pension - Balanced Index	Industry Fund	Yes	21.2%	59	8.4%	24	8.3%	55	7.6%	48		
HESTA Income Stream - Balanced Growth	Industry Fund	Yes	22.2%	44	8.4%	25	9.3%	16	8.3%	21	8.4%	31
FES Super Pension - Smoothed Option	Government Fund	No	15.9%	124	8.4%	26	8.1%	63	7.1%	63		
Media Super Pension - Balanced	Industry Fund	Yes	19.4%	90	8.4%	27	9.7%	10	8.7%	15	8.7%	21
Mercer AP - Mercer Growth	Retail Fund	Yes	22.4%	40	8.4%	28	8.4%	52	7.6%	51	7.9%	51
Australian Ethical Super Pension - Balanced (pension)	Retail Fund	Yes	16.0%	123	8.3%	29	7.9%	70	7.7%	44	7.3%	64
Suncorp Brighter Pension - Universal Growth Fund	Retail Fund	Yes	24.7%	13	8.3%	30						
NGS Income Stream - Indexed Growth	Industry Fund	Yes	23.4%	25	8.3%	31	8.7%	34	8.3%	22		
Super SA Income Stream - Socially Responsible	Government Fund	No	23.2%	28	8.3%	32	8.4%	50			8.1%	41
MLC MKPF - MLC Horizon 4 Balanced Portfolio	Retail Fund	Yes	22.6%	37	8.2%	33	8.6%	41	7.8%	41	8.1%	42
Mercer AP - Mercer Enhanced Passive Growth	Retail Fund	Yes	21.9%	50	8.2%	34	8.4%	52	7.8%	43	8.2%	39
Aware Super Allocated Pension Fund - Growth Plus Fund	Industry Fund	Yes	20.5%	71	8.1%	35	8.4%	47	7.9%	37		
Fiducian ABP - Balanced Fund	Retail Fund	Yes	26.6%	7	8.1%	36	8.5%	44	8.1%	31	7.9%	50
MyLife MyPension - Moderately Aggressive	Industry Fund	Yes	22.8%	32	8.0%	37	10.0%	6	9.4%	8	9.4%	7
PFAP - IOOF MultiMix Balanced Growth Trust	Retail Fund	Yes	17.4%	104	8.0%	38	8.7%	37			8.0%	44
smartMonday PENSION - Balanced Growth Active	Retail Fund	Yes	24.7%	14	8.0%	39	8.5%	45	7.8%	42	8.4%	33
Energy Super Income Stream - SRI Balanced	Industry Fund	Yes	22.1%	48	8.0%	40	8.1%	64	7.1%	64	7.8%	52
AMP Flexible Super Ret - Super Easy Balanced	Retail Fund	Yes	22.0%	49	7.9%	41	7.8%	72	7.5%	57	8.0%	46
Spirit Super TAP - Balanced	Industry Fund	Yes	20.1%	78	7.9%	42	9.1%	21	9.1%	9	8.4%	29
Spirit Super Pension - Balanced	Industry Fund	Yes	20.1%	78	7.9%	42	9.1%	21	9.1%	9	8.4%	29
Equip Pensions - Balanced Growth	Industry Fund	Yes	21.5%	57	7.9%	44	9.2%	19	8.2%	29	8.6%	23
PFAP - IOOF MultiSeries 70	Retail Fund	Yes	17.6%	101	7.9%	45	8.1%	66			7.4%	62
StatewideSuper Pension - Growth	Industry Fund	Yes	22.1%	47	7.8%	46	9.5%	12	9.4%	7		
legalsuper Pension - Balanced	Industry Fund	Yes	23.5%	24	7.8%	47	8.9%	28	8.1%	34	8.3%	35
ESSSuper Income Streams - Ethically Minded	Government Fund	No	22.3%	43	7.8%	48						
MLC MKPF - MLC Index Plus Balanced Portfolio	Retail Fund	Yes	22.2%	46	7.8%	49	8.0%	68	7.3%	61		
ING DIRECT LSP - Growth	Retail Fund	Yes	22.3%	42	7.7%	50	8.2%	61	7.5%	58		
Investment Options			146		138		126		105		102	
Maximum			32.4%		11.4%		10.6%		9.9%		10.1%	
Quartile 1			22.5%		8.1%		8.9%		8.2%		8.5%	
Median			20.4%		7.3%		8.1%		7.5%		7.8%	
Quartile 3			16.9%		6.6%		7.3%		6.7%		7.0%	
Minimum			10.6%		1.4%		3.4%		3.8%		5.0%	

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.