

Retirement Products Performance Tables: 31 July 2020

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 July 2020									
			1 year	Rank	3 years	Rank	5 years	Rank	7 years	Rank	10 years	Rank
UniSuper Pension - Sustainable Balanced	Industry Fund	Ltd	4.7%	3	9.8%	1	7.7%	3	9.8%	2	9.6%	2
Suncorp Brighter Super pension - Suncorp Multi-Manager Grc	Retail Fund	Yes	3.0%	4	9.1%	2						
UniSuper Pension - Balanced	Industry Fund	Ltd	0.1%	36	8.2%	3	7.5%	4	9.3%	4	9.6%	3
HESTA Income Stream - Eco	Industry Fund	Yes	1.1%	10	8.1%	4	8.5%	1	10.2%	1		
WA Super Retirement - Sustainable Future	Industry Fund	Yes	6.7%	2	7.9%	5	6.7%	14	8.7%	8	8.6%	17
Australian Catholic Super RetireChoice - Socially Responsible	Industry Fund	Yes	0.6%	18	7.6%	6	5.6%	46	7.3%	42	8.0%	33
AustralianSuper Choice Income - Indexed Diversified	Industry Fund	Yes	0.5%	19	7.5%	7	6.3%	26	7.6%	30		
AustralianSuper Choice Income - Balanced	Industry Fund	Yes	0.2%	33	7.4%	8	7.3%	7	9.2%	6	9.3%	5
ESSSuper Income Streams - Basic Growth	Government Fund	No	-0.4%	51	7.3%	9						
Cbus Super Income Stream - Growth (Cbus Choice)	Industry Fund	Yes	0.7%	14	7.3%	10	7.8%	2	9.2%	5	9.4%	4
TASPLAN Tasplan Pension - Balanced	Industry Fund	Yes	0.0%	40	7.2%	11	6.6%	19	8.2%	17	8.3%	25
Sunsuper Income Account - Balanced Index	Industry Fund	Yes	0.3%	24	7.2%	12	6.1%	34	8.1%	19	8.5%	20
Media Super Pension - Growth	Industry Fund	Yes	-2.2%	113	7.2%	13	7.3%	6	8.8%	7	8.8%	9
Vision Income Streams - Balanced Growth	Industry Fund	Yes	1.8%	7	7.2%	14	6.8%	10	8.2%	18	8.6%	16
CareSuper Pension - Sustainable Balanced	Industry Fund	Yes	0.8%	12	7.1%	15	6.5%	20	8.0%	25	8.8%	10
First State Super Pension - Growth	Industry Fund	Yes	0.7%	13	7.0%	16	6.7%	13	8.1%	22	8.8%	12
PFAP - IOOF MultiMix Balanced Growth Trust	Retail Fund	Yes	0.7%	15	6.9%	17	5.8%	40			7.7%	44
FirstChoice WP - Colonial First State Wholesale Diversified	Retail Fund	Yes	-0.7%	60	6.9%	18	5.9%	38	7.5%	37	7.9%	38
HESTA Income Stream - Balanced	Industry Fund	Yes	0.3%	26	6.9%	19	6.6%	18	8.0%	24	8.0%	34
Media Super Pension - Balanced	Industry Fund	Yes	-1.0%	71	6.9%	20	6.9%	9	8.2%	16	8.3%	24
AustChoice Super ABP - IOOF MultiMix Balanced Growth Tru	Retail Fund	Yes	0.6%	17	6.9%	21	5.7%	43				
Vision Income Streams - Balanced	Industry Fund	Yes	2.3%	5	6.7%	22	6.5%	21	7.5%	36	8.0%	35
legalsuper Pension - Balanced Index	Industry Fund	Yes	-2.8%	130	6.7%	23	5.4%	55	7.1%	48		
smartMonday PENSION - Balanced Growth Index	Retail Fund	Yes	-1.5%	90	6.7%	24	5.8%	42	7.6%	32	8.2%	30
VicSuper Flexible Income - Growth	Industry Fund	Yes	0.3%	28	6.6%	25	6.2%	28	8.2%	15	8.8%	7
QSuper Income - QSuper Aggressive	Government Fund	Yes	-0.9%	68	6.6%	26	7.4%	5	9.5%	3	10.2%	1
Australian Ethical Super Pension - Balanced (pension)	Retail Fund	Yes	0.9%	11	6.5%	27	6.2%	29	7.0%	53	7.0%	71
PursuitSel AP - IOOF MultiMix Balanced Growth Trust	Retail Fund	Yes	0.2%	30	6.5%	28	5.4%	53			7.3%	57
PFAP - IOOF MultiSeries 70	Retail Fund	Yes	0.2%	32	6.5%	29	5.2%	63			7.1%	64
Equip Pensions - Balanced Growth	Industry Fund	Yes	0.0%	39	6.4%	30	5.9%	37	7.6%	31	8.3%	26
AustChoice Super ABP - IOOF MultiSeries 70	Retail Fund	Yes	0.1%	35	6.4%	31	5.1%	66				
WA Super Retirement - Diversified Moderate	Industry Fund	Yes	1.5%	8	6.4%	32	5.6%	48	7.2%	45	7.9%	40
Mercer AP - Mercer Growth	Retail Fund	Yes	-1.0%	70	6.4%	33	5.4%	57	7.0%	57	7.6%	50
ANZ Australian Staff Super ABP - Balanced Growth	Corporate Fund	No	0.3%	29	6.3%	34	6.1%	32			8.5%	21
TASPLAN Tasplan Pension - Sustainable	Industry Fund	Yes	-1.4%	86	6.3%	35						
StatewideSuper Pension - Active Balanced	Industry Fund	Yes	-1.0%	75	6.2%	36	6.6%	15	8.4%	12		
NGS Income Stream - Retire Plus	Industry Fund	Yes	-1.8%	96	6.2%	37						
StatewideSuper Pension - Growth	Industry Fund	Yes	-2.2%	109	6.2%	38	6.7%	12	8.7%	9		
AustChoice Super ABP - IOOF Balanced Investor Trust	Retail Fund	Yes	-0.5%	53	6.2%	39	5.5%	52				
NGS Income Stream - Moderate Growth	Industry Fund	Yes	-0.9%	64	6.2%	40	5.9%	39	7.2%	44		
MyLife MyPension - Moderately Aggressive	Industry Fund	Yes	0.2%	31	6.2%	41	7.2%	8	8.6%	10	9.1%	6
NGS Income Stream - Diversified	Industry Fund	Yes	-1.4%	88	6.2%	42	6.1%	35	7.6%	29	7.9%	36
FirstChoice WP - Colonial First State Wholesale Balanced	Retail Fund	Yes	0.5%	20	6.2%	43	5.1%	67	6.2%	79	6.2%	88
NGS Income Stream - Indexed Growth	Industry Fund	Yes	-3.5%	142	6.1%	44	5.5%	51	7.5%	35		
Super SA Income Stream - Socially Responsible	Government Fund	No	-0.7%	58	6.1%	45	4.9%	75			7.6%	49
PursuitSel AP - IOOF MultiSeries 70	Retail Fund	Yes	-0.3%	46	6.1%	46	4.8%	85			6.7%	77
Mercer AP - Mercer Socially Responsible Growth	Retail Fund	Yes	0.4%	22	6.1%	47	5.1%	71	6.9%	59	7.7%	46
Mercer AP - Mercer SmartPath Born 1959 -1963	Retail Fund	Yes	-0.7%	56	6.1%	47						
legalsuper Pension - Balanced Socially Responsible	Industry Fund	Yes	0.1%	34	6.0%	49	4.6%	95	6.5%	69	6.7%	79
HOSTPLUS Pension - Socially Responsible Investment (SRI)	Industry Fund	Yes	-1.0%	76	6.0%	50						
Investment Options			156		147		135		104		104	
Maximum			7.5%		9.8%		8.5%		10.2%		10.2%	
Quartile 1			0.0%		6.2%		6.1%		7.8%		8.3%	
Median			-1.2%		5.5%		5.1%		7.0%		7.5%	
Quartile 3			-2.3%		4.6%		4.4%		6.3%		6.7%	
Minimum			-13.2%		0.2%		1.6%		3.5%		0.3%	

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.