

Retirement Products Performance Tables: 31 December 2019

TOP 50 RETIREMENT PRODUCTS – CAPITAL STABLE INVESTMENT OPTIONS

Capital stable investment options (diversified asset allocation with less than 55% growth asset weighting)

Product & Investment Option Name	Segment	Public offer	Performance to 31 December 2019									
			1 year	Rank	3 years	Rank	5 years	Rank	7 years	Rank	10 years	Rank
TASPLAN Tasplan Pension - Sustainable	Industry Fund	Yes	17.6%	2	9.9%	1						
AustralianSuper Choice Income - Conservative Balanced	Industry Fund	Yes	14.6%	3	9.0%	2	8.4%	1	9.4%	1	8.7%	1
Cbus Super Income Stream - Conservative Growth	Industry Fund	Yes	13.5%	9	8.7%	3	8.3%	2				
Telstra Super RetireAccess - Defensive Growth	Corporate Fund	Yes	14.2%	4	8.5%	4	8.0%	3	9.0%	3		
First State Super Pension - Balanced Growth	Industry Fund	Yes	13.3%	12	8.4%	5	7.3%	7	8.4%	4	7.8%	4
UniSuper Pension - Conservative Balanced	Industry Fund	Ltd	13.1%	13	8.1%	6	7.7%	4	9.2%	2	8.4%	3
NGS Income Stream - Balanced	Industry Fund	Yes	11.2%	29	8.0%	7	7.3%	8	8.2%	6	7.4%	7
TASPLAN Tasplan Pension - Moderate	Industry Fund	Yes	13.7%	8	7.8%	8						
StatewideSuper Pension - Conservative Balanced	Industry Fund	Yes	10.8%	34	7.8%	9	7.6%	5				
Media Super Pension - Moderate Growth	Industry Fund	Yes	13.8%	5	7.6%	10	6.4%	18				
Qantas Super Gateway Income Account - Balanced	Corporate Fund	No	12.0%	20	7.6%	11	6.3%	22	7.5%	12	7.0%	15
Mercy Super Income Streams - Conservative	Corporate Fund	No	10.8%	35	7.5%	12	7.6%	6	8.3%	5	7.6%	6
LUCRF Pensions - Moderate	Industry Fund	Yes	12.3%	19	7.5%	13	6.8%	12	7.7%	11		
Equip Pensions - Balanced	Industry Fund	Yes	10.8%	36	7.2%	14	6.5%	15	7.8%	10	7.3%	9
Energy Super Income Stream - Capital Managed	Industry Fund	Yes	11.7%	22	7.2%	15	6.9%	10	8.2%	7	7.8%	5
ANZ SCP - ANZ Smart Choice Moderate	Retail Fund	Yes	13.8%	7	7.2%	16	6.3%	20	7.4%	15		
NGS Income Stream - Defensive	Industry Fund	Yes	9.0%	83	7.1%	17	6.5%	16	7.0%	24	6.8%	20
AustralianSuper Choice Income - Stable	Industry Fund	Yes	10.6%	38	7.1%	18	6.8%	11	7.4%	14	7.3%	10
Intrust Super Stream - Conservative	Industry Fund	Yes	10.3%	46	7.0%	19	6.5%	17	7.8%	8	6.9%	16
ANZ SCP - ANZ Smart Choice 1950s	Retail Fund	Yes	13.4%	11	7.0%	20	6.2%	27	7.3%	16		
Russell iQR - Russell Diversified 50 Portfolio	Retail Fund	Yes	13.8%	6	6.9%	21	6.2%	24				
ESSSuper Income Streams - Balanced	Government Fund	No	11.1%	33	6.9%	22	6.3%	23	7.1%	19	7.2%	12
HESTA Income Stream - Conservative	Industry Fund	Yes	9.8%	62	6.8%	23	6.3%	21	7.0%	25	6.6%	26
MyLife MyPension - Moderately Conservative	Industry Fund	Yes	9.9%	60	6.8%	24	7.0%	9	7.8%	9	7.3%	11
Mercer AP - Mercer Moderate Growth	Retail Fund	Yes	12.9%	15	6.8%	25	6.2%	28	7.2%	18	6.6%	27
Sunsuper Income Account - Conservative	Industry Fund	Yes	10.1%	50	6.7%	26	6.4%	19	6.7%	30	6.6%	23
WA Super Retirement - Diversified Conservative	Industry Fund	Yes	11.4%	25	6.5%	27	5.7%	40	7.1%	20	7.0%	14
Australian Catholic Super RetireChoice - Conservative	Industry Fund	Yes	10.5%	44	6.5%	28	5.5%	44	6.9%	26	6.5%	29
Media Super Pension - Stable	Industry Fund	Yes	9.4%	71	6.4%	29	6.1%	29	6.5%	35	6.3%	37
Cbus Super Income Stream - Conservative	Industry Fund	Yes	9.7%	64	6.4%	30	6.2%	26	6.8%	28	6.8%	19
MTAA Super Pension - Income Focussed	Industry Fund	Yes	11.4%	26	6.4%	31	6.6%	13				
MLC MKPF - MLC Horizon 3 Conservative Growth Portfolio	Retail Fund	Yes	11.5%	24	6.4%	32	5.8%	35	7.1%	21	6.6%	24
Telstra Super RetireAccess - Conservative	Corporate Fund	Yes	10.2%	48	6.4%	33	6.2%	25	7.4%	13	7.4%	8
Vision Income Streams - Conservative	Industry Fund	Yes	9.7%	63	6.3%	34	5.8%	34	6.4%	38	6.6%	25
ANZ SCP - ANZ Smart Choice 1940s	Retail Fund	Yes	11.7%	23	6.3%	35	5.1%	59	5.5%	68		
UniSuper Pension - Conservative	Industry Fund	Ltd	9.2%	78	6.3%	36	5.9%	30	7.0%	23	7.2%	13
Mercer AP - Mercer SmartPath Born 1949 -1953	Retail Fund	Yes	12.0%	21	6.3%	37						
Bendigo SSP - Bendigo Conservative Index Fund	Retail Fund	Yes	12.4%	18	6.2%	38	5.6%	43	6.9%	27		
MLC MKPF - MLC Index Plus Conservative Growth Portfolio	Retail Fund	Yes	12.7%	17	6.2%	39	5.5%	47	7.2%	17		
Prime Super Superannuation Income Stream - Conservative	Industry Fund	Yes	7.9%	108	6.1%	40	6.6%	14	7.1%	22	6.4%	31
Qantas Super Gateway Income Account - Conservative	Corporate Fund	No	9.4%	72	6.1%	41	5.0%	62	5.6%	65	5.8%	54
StatewideSuper Pension - Conservative	Industry Fund	Yes	7.5%	112	6.0%	42	5.9%	32				
Media Super Pension - Australian Shares	Industry Fund	Yes	10.6%	39	6.0%	43	5.7%	39				
FirstChoice WP - Colonial First State Wholesale Conservative	Retail Fund	Yes	10.5%	42	6.0%	44	4.9%	64	6.0%	50	5.5%	62
AMP Flexible Super Ret - Professional Moderately Conservative	Retail Fund	Yes	12.7%	16	6.0%	45	5.3%	53				
TASPLAN Tasplan Pension - Conservative	Industry Fund	Yes	10.0%	55	6.0%	46	5.5%	46	6.2%	44	6.3%	35
ANZ Australian Staff Super ABP - Cautious	Corporate Fund	No	9.9%	56	5.9%	47	5.4%	49			6.6%	22
LUCRF Pensions - Targeted Return	Industry Fund	Yes	7.3%	119	5.9%	48	5.9%	33	6.6%	31		
MTAA Super Pension - Conservative	Industry Fund	Yes	8.9%	90	5.8%	49	5.8%	37	6.2%	45	5.7%	55
CareSuper Pension - Capital Stable	Industry Fund	Yes	9.0%	86	5.8%	50	5.7%	38	6.6%	33	6.8%	18
Investment Options			137		133		130		102		88	
Maximum			20.2%		9.9%		8.4%		9.4%		8.7%	
Quartile 1			10.8%		6.3%		5.9%		6.9%		6.6%	
Median			9.5%		5.6%		4.9%		5.9%		6.0%	
Quartile 3			8.2%		4.8%		4.4%		5.2%		5.3%	
Minimum			0.9%		1.0%		1.2%		1.5%		2.4%	

Performance figures are net of taxes and all applicable fees. These fees include investment, management and administration, and members fees as well as the Indirect Cost Ratio which is treated as a fee. For products that charge dollar-based member fees, Rainmaker assumes a \$50,000 account balance. Your achieved performance may vary based on personal circumstances and additional costs such as insurance etc. may apply; ask your fund for details. Past performance is no guarantee of future results.