

Sunsuper Investment Performance Summary to 28 February 2019 for Transition to retirement income accounts

Diversified options							
	Three Months	Financial Year to Date	1 Year (% p.a.)	3 Years (% p.a.)	5 Years (% p.a.)	7 Years (% p.a.)	10 Years (% p.a.)
Growth							
Net return	5.0%	3.4%	6.7%	11.8%	9.0%	10.3%	9.5%
Balanced							
Net return	4.4%	3.4%	6.3%	10.4%	8.3%	9.7%	9.3%
Balanced-Index							
Net return	5.1%	2.8%	5.7%	8.3%	7.3%	9.4%	9.3%
Socially Conscious Balanced							
Net return	4.4%	2.3%	5.4%	8.0%	6.2%	8.4%	8.5%
Retirement							
Net return	3.7%	3.1%	5.5%	8.2%	6.5%	7.4%	7.3%
Conservative							
Net return	2.8%	2.8%	4.5%	6.3%	5.4%	6.1%	6.5%
Diversified Alternatives							
Net return	1.1%	4.3%	8.6%	n/a	n/a	n/a	n/a

Single asset class options							
	Three Months	Financial Year to Date	1 Year (% p.a.)	3 Years (% p.a.)	5 Years (% p.a.)	7 Years (% p.a.)	10 Years (% p.a.)
Shares							
Net return	6.8%	2.7%	5.7%	13.1%	8.5%	10.7%	11.1%
Australian Shares							
Net return	9.1%	1.8%	6.0%	12.6%	7.7%	10.1%	11.2%
Australian Shares - Index							
Net return	9.4%	3.5%	7.9%	13.0%	7.6%	10.2%	11.1%
International Shares - Index (hedged)							
Net return	1.7%	0.7%	2.5%	12.3%	8.8%	11.2%	13.4%
International Shares - Index (unhedged)							
Net return	5.1%	4.2%	9.6%	12.2%	11.4%	15.4%	11.4%
Emerging Markets Shares							
Net return	7.8%	2.6%	-1.9%	13.3%	6.7%	6.3%	6.9%

- Net return is after investment fees and taxes but before all other fees and costs.
- Past performance is not a reliable indication of future performance.
- Financial year to date is the period from 1 July.
- "n/a" where option return for the period is not available.

Notes

All historical Transition to retirement income account returns shown here reflect investment tax of up to 15%. It is important to note that this tax did not apply to Transition to retirement income account returns before 1 July 2017. Refer to the Retirement income account investment performance report for actual performance up to 30 June 2017.

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Single asset class options							
	Three Months	Financial Year to Date	1 Year (% p.a.)	3 Years (% p.a.)	5 Years (% p.a.)	7 Years (% p.a.)	10 Years (% p.a.)
Property							
Net return	2.9%	4.9%	9.9%	9.5%	9.1%	9.6%	10.3%
Australian Property - Index							
Net return	8.9%	7.4%	16.9%	8.1%	11.9%	13.3%	13.2%
Diversified Bonds							
Net return	2.6%	2.9%	3.4%	3.8%	3.4%	4.3%	6.4%
Diversified Bonds - Index							
Net return	2.4%	3.0%	4.0%	2.6%	4.2%	4.5%	5.3%
Cash							
Net return	0.5%	1.4%	2.0%	2.0%	2.2%	2.6%	3.1%
Capital Guaranteed							
Net return	0.5%	1.5%	2.5%	2.6%	3.1%	3.2%	3.4%

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