

Sunsuper Investment Performance Summary to 31 May 2021 for Super-savings accounts

Lifecycle Investment Strategy							
	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.)
Balanced Pool							
Net return	5.8%	18.0%	19.4%	8.5%	9.3%	8.6%	8.7% ⁽¹⁾
Retirement Pool							
Net return	4.3%	12.8%	13.9%	6.6%	7.1%	6.6%	6.8% ⁽²⁾
Cash Pool							
Net return	0.0%	0.2%	0.3%	1.0%	1.3%	1.5%	2.0% ⁽³⁾

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	7.0%	22.3%	24.1%	9.8%	10.7%	9.7%	9.5%
Balanced							
Net return	5.9%	18.1%	19.6%	8.6%	9.3%	8.7%	8.7%
Balanced-Index							
Net return	5.7%	17.0%	18.3%	9.1%	8.3%	8.3%	8.8%
Socially Conscious Balanced							
Net return	6.6%	17.4%	18.1%	8.5%	8.1%	7.3%	7.9%
Retirement							
Net return	4.3%	12.7%	13.9%	6.6%	7.2%	6.7%	6.8%
Conservative							
Net return	2.8%	8.0%	9.0%	5.0%	5.4%	5.3%	5.6%
Diversified Alternatives							
Net return	4.3%	15.7%	17.7%	8.5%	n/a	n/a	n/a

- 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

- (1) The Balanced Pool commenced on 4 October 2013. The Balanced Pool has identical investments to the Balanced Option. To show our performance for the Balanced Pool we have shown the returns for the Balanced Option up to 4 October 2013 with the returns for the Balanced Pool from the 4 October 2013.
- (2) The Retirement Pool commenced on 4 October 2013. The Retirement Pool has identical investments to the Retirement Option. To show our performance for the Retirement Pool we have shown the returns for the Retirement Option (adjusted to reflect fee differences) up to 4 October 2013 with the returns for the Retirement Pool from the 4 October 2013.
- (3) The Cash Pool commenced on 4 October 2013. The Cash Pool has identical investments to the Cash Option. To show our performance for the Cash Pool we have shown the returns for the Cash Option (adjusted to reflect fee differences) up to 4 October 2013 with the returns for the Cash Pool from the 4 October 2013.

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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.)
Shares							
Net return	8.1%	26.8%	29.3%	11.5%	12.1%	10.0%	10.0%
Australian Shares							
Net return	8.1%	25.5%	27.9%	9.3%	10.1%	8.4%	9.0%
Australian Shares - Index							
Net return	7.9%	23.4%	25.9%	10.1%	10.2%	8.5%	8.9%
International Shares - Index (hedged)							
Net return	7.9%	31.0%	34.0%	11.6%	12.6%	10.6%	11.2%
International Shares - Index (unhedged)							
Net return	8.7%	21.4%	20.2%	12.3%	11.9%	12.6%	13.3%
Emerging Markets Shares							
Net return	3.8%	24.8%	29.1%	8.2%	11.3%	7.5%	6.1%
Property							
Net return	4.7%	13.3%	14.6%	6.8%	7.2%	7.8%	7.9%
Australian Property - Index							
Net return	10.3%	23.3%	22.2%	6.6%	5.5%	9.4%	10.4%
Diversified Bonds							
Net return	0.9%	0.9%	1.7%	3.6%	3.4%	3.4%	4.2%
Diversified Bonds - Index							
Net return	0.7%	-1.0%	-0.6%	3.4%	2.7%	3.7%	4.6%
Cash							
Net return	0.1%	0.4%	0.4%	1.3%	1.6%	1.8%	2.4%

- Net return is after investment fees and taxes but before all other fees and costs.
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