

Sunsuper Investment Performance Summary to 31 August 2021 for Transition to retirement income accounts

Diversified options						
	Three Months	1 Year (% p.a.)	3 Years (% p.a.)	5 Years (% p.a.)	7 Years (% p.a.)	10 Years (% p.a.)
Growth						
Net return	6.3%	26.3%	10.4%	11.5%	10.2%	10.6%
SuperRatings Index	5.6%	22.3%	9.3%	10.0%	9.1%	10.2%
Balanced						
Net return	5.5%	21.6%	9.1%	10.0%	9.1%	9.7%
SuperRatings Index	4.8%	18.3%	8.1%	8.6%	8.1%	9.0%
Balanced-Index						
Net return	5.4%	19.4%	9.5%	9.0%	8.7%	9.9%
SuperRatings Index	4.8%	18.3%	8.1%	8.6%	8.1%	9.0%
Socially Conscious Balanced						
Net return	4.4%	19.1%	8.7%	8.8%	7.6%	9.0%
SuperRatings Index	4.8%	18.3%	8.1%	8.6%	8.1%	9.0%
Retirement						
Net return	4.5%	15.8%	7.1%	7.7%	7.0%	7.5%
SuperRatings Index	3.7%	13.3%	6.5%	6.7%	6.4%	7.2%
Conservative						
Net return	3.1%	10.2%	5.3%	5.6%	5.5%	6.0%
SuperRatings Index	2.4%	8.0%	4.6%	4.6%	4.8%	5.5%
Diversified Alternatives						
Net return	4.5%	19.4%	8.7%	n/a	n/a	n/a

Single asset class options						
	Three Months	1 Year (% p.a.)	3 Years (% p.a.)	5 Years (% p.a.)	7 Years (% p.a.)	10 Years (% p.a.)
Shares						
Net return	6.4%	28.7%	11.9%	12.8%	10.5%	11.6%
SuperRatings Index	6.4%	25.6%	10.6%	11.3%	10.0%	11.1%
Australian Shares						
Net return	6.0%	28.5%	9.8%	10.9%	8.8%	10.4%
SuperRatings Index	5.6%	26.8%	9.5%	10.4%	8.7%	10.2%
Australian Shares - Index						
Net return	5.6%	26.1%	10.1%	10.8%	8.8%	10.4%
SuperRatings Index	5.6%	26.8%	9.5%	10.4%	8.7%	10.2%
International Shares - Index (hedged)						
Net return	6.3%	27.9%	12.2%	13.3%	11.0%	13.1%
SuperRatings Index	8.3%	28.5%	12.7%	13.4%	12.4%	13.7%
International Shares - Index (unhedged)						
Net return	11.0%	30.1%	13.1%	14.4%	14.0%	15.7%
SuperRatings Index	8.3%	28.5%	12.7%	13.4%	12.4%	13.7%

- 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.
 - "n/a" where option return for the period is not available.

Source: SuperRatings Fund Crediting Rate Survey.

- The SuperRatings Index return is after investment fees and tax.
 - The SuperRatings Index for each option is the median return for the largest investment options with a similar asset allocation.

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	1 Year (% p.a.)	3 Years (% p.a.)	5 Years (% p.a.)	7 Years (% p.a.)	10 Years (% p.a.)
Emerging Markets Shares						
Net return	2.2%	23.1%	9.2%	10.3%	7.2%	7.5%
Property						
Net return	5.7%	18.6%	7.6%	7.4%	8.0%	9.1%
Australian Property - Index						
Net return	11.3%	27.9%	8.6%	6.5%	9.7%	12.1%
SuperRatings Index	5.2%	16.0%	5.9%	6.5%	8.0%	8.5%
Diversified Bonds						
Net return	1.7%	1.8%	4.0%	3.3%	3.4%	4.3%
Diversified Bonds - Index						
Net return	1.3%	0.1%	3.6%	2.5%	3.6%	4.4%
SuperRatings Index	1.2%	1.3%	3.4%	2.8%	3.2%	4.1%
Cash						
Net return	0.1%	0.3%	1.1%	1.5%	1.7%	2.3%
SuperRatings Index	0.0%	0.2%	0.9%	1.2%	1.5%	2.0%

- 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.
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