

Sunsuper Investment Performance Summary to 29 February 2020 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	-2.2%	2.7%	8.4%	9.5%	8.3%	9.7%	8.8%
SuperRatings Index	-2.0%	2.8%	7.8%	8.3%	6.9%	9.0%	8.3%
Balanced							
Net return	-1.4%	2.9%	8.1%	8.6%	7.6%	9.1%	8.3%
SuperRatings Index	-1.4%	2.9%	7.5%	7.6%	6.3%	8.1%	7.7%
Balanced-Index							
Net return	-1.8%	3.3%	9.2%	7.6%	6.0%	8.5%	8.1%
SuperRatings Index	-1.4%	2.9%	7.5%	7.6%	6.3%	8.1%	7.7%
Socially Conscious Balanced							
Net return	-1.1%	3.1%	8.2%	7.5%	5.3%	7.4%	7.3%
SuperRatings Index	-1.4%	2.9%	7.5%	7.6%	6.3%	8.1%	7.7%
Retirement							
Net return	-0.5%	3.0%	7.5%	7.2%	6.2%	7.1%	6.7%
SuperRatings Index	-0.7%	2.5%	6.6%	6.3%	5.1%	6.5%	6.6%
Conservative							
Net return	0.4%	3.0%	6.6%	5.8%	5.2%	5.8%	5.9%
SuperRatings Index	0.1%	2.5%	5.5%	4.9%	4.2%	5.2%	5.5%
Diversified Alternatives							
Net return	1.6%	4.5%	9.1%	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	-4.6%	1.1%	7.8%	9.4%	7.3%	9.5%	8.5%
SuperRatings Index	-3.3%	2.4%	7.9%	9.0%	7.1%	9.7%	9.0%
Australian Shares							
Net return	-5.7%	-0.6%	7.2%	8.2%	6.5%	8.3%	7.9%
SuperRatings Index	-5.2%	0.6%	7.7%	8.3%	6.5%	7.9%	7.9%
Australian Shares - Index							
Net return	-4.4%	0.7%	8.9%	8.9%	6.6%	8.5%	8.2%
SuperRatings Index	-5.2%	0.6%	7.7%	8.3%	6.5%	7.9%	7.9%
International Shares - Index (hedged)							
Net return	-6.4%	-0.9%	3.6%	6.4%	6.3%	9.6%	10.2%
SuperRatings Index	-1.8%	5.0%	10.9%	11.1%	8.3%	12.5%	10.3%
International Shares - Index (unhedged)							
Net return	-1.8%	7.2%	13.5%	12.7%	9.7%	15.2%	11.9%
SuperRatings Index	-1.8%	5.0%	10.9%	11.1%	8.3%	12.5%	10.3%

- 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.

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.

The information contained in this publication is given in good faith and is not a substitute for professional advice. While all reasonable care has been taken in producing this information, Sunsuper Pty Ltd, its subsidiary Sunsuper Financial Services Pty Ltd, and their directors and employees do not warrant the accuracy or completeness of this information and will not be held responsible for any loss suffered as a result of relying on this information.

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	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.)
Emerging Markets Shares							
Net return	1.4%	4.4%	7.1%	9.9%	5.5%	6.7%	5.0%
Property							
Net return	0.3%	3.4%	5.4%	7.1%	6.6%	8.4%	9.1%
Australian Property - Index							
Net return	-2.7%	1.6%	11.3%	9.3%	8.2%	10.9%	11.1%
SuperRatings Index	-0.8%	1.9%	6.9%	8.1%	7.9%	8.7%	8.9%
Diversified Bonds							
Net return	1.7%	3.2%	6.9%	4.5%	3.8%	4.1%	5.2%
Diversified Bonds - Index							
Net return	1.8%	3.7%	7.9%	4.6%	4.0%	4.7%	5.5%
SuperRatings Index	1.3%	2.9%	6.0%	4.0%	3.3%	3.9%	4.9%
Cash							
Net return	0.3%	1.0%	1.7%	1.9%	2.0%	2.2%	2.9%
SuperRatings Index	0.3%	0.8%	1.3%	1.6%	1.7%	1.9%	2.5%
Capital Guaranteed							
Net return	0.4%	1.3%	3.1%	2.7%	2.9%	3.1%	3.5%
SuperRatings Index	0.3%	1.2%	2.2%	2.1%	2.0%	2.4%	2.9%

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