

Sunsuper Investment Performance Summary to 31 July 2019 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	4.0%	9.3%	11.4%	9.8%	11.4%	9.3%
SuperRatings Index	3.5%	7.6%	9.3%	8.5%	10.8%	9.0%
Balanced						
Net return	3.6%	8.8%	10.1%	8.9%	10.6%	8.8%
SuperRatings Index	3.1%	7.2%	8.4%	7.8%	9.5%	8.3%
Balanced-Index						
Net return	3.8%	9.1%	7.9%	8.2%	10.2%	8.8%
SuperRatings Index	3.1%	7.2%	8.4%	7.8%	9.5%	8.3%
Socially Conscious Balanced						
Net return	3.5%	7.5%	7.9%	6.9%	9.1%	7.9%
SuperRatings Index	3.1%	7.2%	8.4%	7.8%	9.5%	8.3%
Retirement						
Net return	3.2%	7.8%	8.0%	7.1%	8.1%	7.0%
SuperRatings Index	2.7%	6.7%	6.7%	6.2%	7.5%	7.1%
Conservative						
Net return	2.6%	6.6%	6.2%	5.8%	6.4%	6.2%
SuperRatings Index	2.2%	5.7%	4.8%	4.9%	5.6%	5.9%
Diversified Alternatives						
Net return	3.6%	8.8%	n/a	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	4.5%	9.6%	12.2%	9.4%	12.3%	9.5%
SuperRatings Index	3.6%	7.6%	10.6%	9.3%	11.9%	9.6%
Australian Shares						
Net return	7.5%	11.5%	11.5%	8.8%	11.8%	9.5%
SuperRatings Index	7.0%	10.0%	10.4%	8.4%	11.2%	9.2%
Australian Shares - Index						
Net return	7.8%	13.6%	11.5%	8.8%	11.8%	9.6%
SuperRatings Index	7.0%	10.0%	10.4%	8.4%	11.2%	9.2%
International Shares - Index (hedged)						
Net return	0.7%	3.5%	10.6%	9.0%	12.2%	11.5%
SuperRatings Index	1.8%	7.5%	11.9%	11.0%	14.0%	10.4%
International Shares - Index (unhedged)						
Net return	2.6%	10.4%	13.2%	13.3%	16.7%	11.5%
SuperRatings Index	1.8%	7.5%	11.9%	11.0%	14.0%	10.4%

- 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.

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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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	-0.5%	4.4%	10.5%	5.7%	8.3%	4.9%
Property						
Net return	1.3%	6.9%	6.5%	8.1%	9.3%	9.6%
Australian Property - Index						
Net return	8.7%	19.5%	6.9%	12.1%	13.3%	12.9%
SuperRatings Index	2.3%	8.4%	7.5%	9.6%	9.3%	9.4%
Diversified Bonds						
Net return	2.7%	6.8%	3.9%	3.8%	4.3%	5.8%
Diversified Bonds - Index						
Net return	3.1%	7.8%	3.1%	4.6%	4.7%	5.6%
SuperRatings Index	2.3%	6.0%	3.2%	3.7%	4.1%	5.5%
Cash						
Net return	0.5%	2.0%	2.0%	2.1%	2.4%	3.0%
SuperRatings Index	0.4%	1.8%	1.7%	1.8%	2.1%	2.6%
Capital Guaranteed						
Net return	1.0%	3.4%	2.8%	3.1%	3.2%	3.5%
SuperRatings Index	0.8%	2.7%	2.0%	2.2%	2.9%	3.4%

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