

		Number of months ending 31 December 2023								
		3	YTD	12	36	60	84	120	180	240
Investment options	Abax Balanced	6.2%	17.3%	17.3%	18.1%	13.7%	10.9%	10.8%		
	Acumen Adagio	3.9%	10.2%	10.2%	7.8%	7.4%	7.8%	8.1%	8.4%	9.0%
	Acumen Moderato (Sanlam Stable Bonus)	2.2%	9.8%	9.8%	7.7%	7.1%	7.2%	8.7%	9.4%	11.5%
	Acumen Vivace	6.9%	13.4%	13.4%	15.8%	12.3%	10.0%	9.9%	12.4%	13.7%
	AF Investments Banker	2.4%	9.3%	9.3%	6.7%	6.9%	7.3%	7.3%	7.2%	
	AF Investments Coronation	7.9%	16.2%	16.2%	11.5%	11.5%	9.0%	8.3%	11.6%	
	AF Investments Performer	5.6%	11.8%	11.8%	11.3%	10.5%	8.8%	8.5%	11.3%	
	AF Investments Shari'ah High Growth	6.2%	7.4%	7.4%	11.5%	10.2%	7.2%	6.6%	8.7%	
	Allan Gray Global Balanced	5.2%	13.4%	13.4%	14.0%	10.4%	8.8%	8.9%	11.0%	13.1%
	Anchor Indexed Growth	6.7%	14.4%	14.4%						
	Aylett Balanced	7.0%	9.9%	9.9%	18.2%	13.3%	11.3%	11.0%		
	Coronation Managed	7.1%	15.6%	15.6%	13.5%	12.6%	9.5%	8.8%	12.4%	
	Coronation Strategic Income	4.3%	10.9%	10.9%	7.7%	7.3%	7.7%	7.9%	8.7%	9.0%
	Foord Balanced	5.4%	14.1%	14.1%	10.4%	10.5%	7.9%	7.5%	10.7%	12.7%
	Nedgroup Flexible Income	3.6%	9.7%	9.7%	8.0%	7.7%	8.0%	8.1%	8.2%	
	Nedgroup High Equity	3.7%	4.9%	4.9%	9.6%	11.3%	8.9%			
	Nedgroup Medium Equity	2.9%	6.4%	6.4%	7.8%	8.8%	7.7%			
	Ninety One Balanced	7.0%	7.8%	7.8%	9.4%	9.2%	8.2%	7.9%	11.0%	12.8%
	Old Mutual Absolute Stable Growth	2.0%	10.0%	10.0%	10.4%	6.9%	6.8%			
	Old Mutual Profile Balanced	6.7%	10.7%	10.7%	11.1%	9.4%	8.3%	8.1%	10.5%	
Old Mutual Profile Edge 28	6.5%	8.9%	8.9%	12.1%	9.7%	8.4%	8.7%	11.2%		
Prescient Income Provider	3.8%	9.9%	9.9%	7.7%	7.3%	7.7%	8.4%	8.4%		
Riscura High Equity	5.8%	10.2%	10.2%							
Riscura Low Equity	6.3%	8.9%	8.9%							
Asset classes & benchmarks	Local equities	8.2%	7.9%	7.9%	12.7%	9.0%	6.9%	7.1%	11.4%	13.5%
	Local property	16.4%	10.1%	10.1%	14.9%	0.2%	-1.7%	2.9%	8.0%	12.4%
	Local bonds	8.1%	9.7%	9.7%	7.4%	8.2%	8.4%	8.0%	7.9%	8.5%
	Local cash	2.1%	8.1%	8.1%	5.7%	5.9%	6.4%	6.4%	6.4%	7.0%
	USDZAR	-3.3%	7.5%	7.5%	7.6%	5.0%	4.2%	5.9%	4.4%	5.2%
	Global equities (USD)	11.0%	22.2%	22.2%	5.7%	11.7%	10.0%	7.9%	10.2%	7.5%
	Global bonds (USD)	8.1%	5.2%	5.2%	-7.2%	-1.4%	-0.1%	-0.3%	0.5%	1.9%
	Global equities (ZAR)	7.4%	31.3%	31.3%	13.8%	17.3%	14.7%	14.3%	15.1%	13.2%
	Global bonds (ZAR)	4.5%	13.0%	13.0%	-0.1%	3.5%	4.1%	5.5%	5.0%	7.2%
	Inflation	0.8%	5.1%	5.1%	6.1%	5.1%	4.9%	5.2%	5.2%	5.5%
	ASISA High Equity average	6.2%	12.3%	12.3%	10.5%	9.2%	7.4%	7.0%	9.0%	10.6%
	ASISA Medium Equity average	5.8%	11.3%	11.3%	9.4%	8.6%	7.1%	6.8%	8.7%	9.8%
	ASISA Low Equity average	5.4%	11.0%	11.0%	8.5%	7.9%	7.0%	6.8%	7.9%	8.6%

**Notes**

- Returns for the investment options and the ASISA averages are shown net of investment management fees.
- Returns for periods longer than 12 months have been annualised.
- Please note that not all of the portfolios listed above are necessarily available for immediate investment. Please refer to the relevant fund's switch form for the latest list of available portfolios.
- Please note that Acumen's actual returns were augmented with the underlying products' net returns to give an indication of the longer term performance histories.