

Retirement Products Performance Tables: 30 June 2021

TOP 50 RETIREMENT PRODUCTS – BALANCED INVESTMENT OPTIONS

Balanced investment options (diversified asset allocation with between 55% and 75% growth asset weighting)

Product & Investment Option Name	Segment	Can anyone join?	Performance to 30 June 2021									
			1 year	Rank	3 years	Rank	5 years	Rank	7 years	Rank	10 years	Rank
UniSuper Pension - Sustainable Balanced	Industry Fund	Yes	18.9%	68	12.2%	1	11.4%	1	10.6%	1	10.8%	1
Future Super - Balanced Growth Pension	Retail Fund	Yes	17.8%	86	11.5%	2	9.3%	38				
Suncorp Brighter Pension - Multi-Manager Growth Fund	Retail Fund	Yes	20.8%	28	11.0%	3	11.2%	2				
Australian Catholic Super RetireChoice - Socially Responsible	Industry Fund	Yes	18.9%	67	10.9%	4	9.8%	18	8.6%	33	9.2%	25
UniSuper Pension - Balanced	Industry Fund	Yes	19.3%	54	10.2%	5	10.6%	5	10.2%	4	10.6%	3
Sunsuper Income Account - Balanced Index	Industry Fund	Yes	21.0%	22	10.2%	6	9.8%	17	9.4%	10	9.9%	10
AustralianSuper Choice Income - Balanced	Industry Fund	Yes	22.1%	7	10.2%	7	11.1%	3	10.3%	2	10.5%	5
ESSuper Income Streams - Basic Growth	Government Fund	No	21.2%	18	10.2%	8						
MLC MKPF - BlackRock Global Allocation Fund	Retail Fund	Yes	22.9%	3	10.1%	9	9.2%	42	7.2%	76	7.8%	67
AustralianSuper Choice Income - Indexed Diversified	Industry Fund	Yes	19.7%	45	9.9%	10	10.0%	13	8.8%	20		
HOSTPLUS Pension - SRI - Balanced	Industry Fund	Yes	25.2%	1	9.8%	11						
CareSuper Pension - Sustainable Balanced	Industry Fund	Yes	19.2%	61	9.8%	12	9.8%	20	9.1%	18	9.7%	11
Vision Income Streams - Sustainable Balanced	Industry Fund	Yes	20.7%	30	9.8%	13						
HOSTPLUS Pension - Indexed Balanced	Industry Fund	Yes	21.1%	20	9.8%	14	10.4%	8	9.3%	11	10.0%	9
Cbus Super Income Stream - Growth (Cbus Choice)	Yes	20.9%	25	9.7%	15	10.8%	4	10.2%	3	10.6%	4	
Mercer AP - Mercer Sustainable Plus Growth	Retail Fund	Yes	21.4%	13	9.6%	16	9.6%	25	8.3%	44	8.9%	39
QSuper Income - QSuper Aggressive	Government Fund	Yes	18.1%	81	9.5%	17	10.1%	11	9.8%	7	10.7%	2
VicSuper Flexible Income - Growth	Industry Fund	Yes	19.4%	50	9.5%	18	10.0%	14	9.0%	19	9.6%	13
HESTA Income Stream - Balanced Growth	Industry Fund	Yes	19.4%	52	9.3%	19	9.9%	16	8.8%	21	9.3%	24
smartMonday PENSION - Balanced Growth Index	Retail Fund	Yes	19.5%	49	9.3%	20	9.4%	35	8.6%	34	9.4%	21
Aware Super Pension - Growth	Industry Fund	Yes	18.8%	69	9.2%	21	10.4%	7	9.1%	17	9.7%	12
Australian Ethical Super Pension - Balanced (pension)	Retail Fund	Yes	14.8%	115	9.1%	22	8.5%	69	8.0%	51	8.1%	57
Media Super Pension - Balanced	Industry Fund	Yes	18.7%	70	9.1%	23	10.1%	10	9.2%	12	9.4%	19
FirstChoice WP - First Sentier Diversified	Retail Fund	Yes	18.4%	76	9.1%	24	9.0%	49	8.4%	39	9.1%	33
Energy Super Income Stream - SRI Balanced	Industry Fund	Yes	21.9%	9	9.0%	25	9.3%	39	7.9%	58	8.8%	41
FirstChoice WP - FirstChoice Wholesale Growth	Retail Fund	Yes	24.1%	2	9.0%	26	9.8%	21	8.7%	28	9.2%	27
Prime Super Super Income Stream - Balanced	Industry Fund	Yes	20.5%	33	9.0%	27	10.4%	6	9.9%	5	10.2%	6
Super SA Income Stream - Socially Responsible	Government Fund	No	21.2%	19	9.0%	28	9.2%	46			8.9%	40
MLC MKPF - MLC Horizon 4 Balanced Portfolio	Retail Fund	Yes	22.6%	4	9.0%	29	9.4%	34	8.4%	40	8.9%	38
Suncorp Brighter Pension - Universal Growth Fund	Retail Fund	Yes	21.5%	11	8.9%	30	8.7%	58				
legalsuper Pension - Balanced Index	Industry Fund	Yes	18.5%	75	8.9%	31	8.9%	52	8.3%	42		
ESSuper Income Streams - Ethically Minded	Government Fund	No	22.2%	6	8.8%	32						
Telstra Super RetireAccess - Balanced	Corporate Fund	Ltd	22.0%	8	8.8%	33	9.7%	22	8.6%	30	9.6%	14
Spirit Super Pension - Sustainable	Industry Fund	Yes	16.1%	107	8.8%	34	9.4%	36				
Mercer AP - Mercer Enhanced Passive Growth	Retail Fund	Yes	19.3%	57	8.8%	35	9.1%	47	8.4%	41	9.2%	31
Aware Super Allocated Pension Fund - Growth Plus Fund	Industry Fund	Yes	19.3%	53	8.7%	36	8.9%	53	8.4%	38		
NGS Income Stream - Indexed Growth	Industry Fund	Yes	19.6%	46	8.7%	37	9.2%	44	8.7%	26		
MyLife MyPension - Moderately Aggressive	Industry Fund	Yes	20.4%	34	8.7%	38	10.2%	9	9.8%	6	10.1%	7
Rest Pension - Diversified	Industry Fund	Yes	21.0%	23	8.6%	39	9.5%	27	8.7%	22	9.6%	15
Fiducian ABP - Balanced Fund	Retail Fund	Yes	21.1%	21	8.6%	40	9.2%	42	8.7%	23	8.7%	46
APSS Pension - Balanced	Government Fund	No	20.1%	40	8.6%	41	8.6%	61				
AMP Flexible Super Ret - Super Easy Balanced	Retail Fund	Yes	19.6%	47	8.6%	42	8.4%	72	8.0%	52	8.8%	43
AustralianSuper Choice Income - Socially Aware	Industry Fund	Yes	21.4%	14	8.6%	43	10.0%	12	9.2%	15	10.0%	8
legalsuper Pension - Balanced	Industry Fund	Yes	19.0%	63	8.5%	44	9.4%	30	8.7%	27	9.1%	34
Spirit Super Pension - Balanced	Industry Fund	Yes	19.3%	55	8.5%	45	9.5%	26	9.5%	9	9.0%	36
ANZ Australian Staff Super ABP - Balanced Growth	Corporate Fund	No	18.9%	66	8.5%	46	9.4%	32			9.2%	30
Mercer AP - Mercer SmartPath Born 1959 -1963	Retail Fund	Yes	16.9%	96	8.5%	47	8.6%	62				
legalsuper Pension - Balanced Socially Responsible	Industry Fund	Yes	19.0%	63	8.3%	48	8.6%	63	7.4%	68	8.0%	61
StatewideSuper Pension - Growth	Industry Fund	Yes	20.1%	39	8.3%	49	9.9%	15	9.6%	8		
TransPension - Balanced Option	Industry Fund	Yes	20.8%	26	8.3%	50	9.4%	31	8.7%	25	9.3%	23
Investment Options			133		126		120		100		92	
Maximum			25.2%		12.2%		11.4%		10.6%		10.8%	
Quartile 1			20.4%		8.8%		9.4%		8.7%		9.3%	
Median			18.9%		8.0%		8.6%		8.0%		8.7%	
Quartile 3			16.5%		7.3%		7.7%		7.2%		7.7%	
Minimum			12.2%		2.9%		4.0%		4.1%		5.6%	

Table is sorted by 3 year performance. Performance figures are net of investment, management, administration fees and the indirect cost ratio. In the case of dollar-based member fees, Rainmaker assumes a \$50,000 account balance. Your achieved performance may vary due to additional costs such as insurance; ask your fund for details. Public offer funds are open to all types of members. Limited public offer means new members may join provided they satisfy certain eligibility conditions. Past performance is no guarantee of future results.