

Equip Super investment returns as of 30 May 2024 - net performance summary



Accumulation	Monthly return (%)	Quarterly return (%)	FYTD return (%)	1-year return (%)	3-year annualised return (%)	5-year annualised return (%)	7-year annualised return (%)	10-year annualised return (%)	15-year annualised return (%)	20-year annualised return (%)
Growth Plus Taxed	1.22	2.47	11.03	13.85	6.79	9.17	9.18	9.33	10.20	8.45
Growth Taxed	1.13	2.25	10.02	12.42	6.10	8.10	8.06	8.28	8.95	
Balanced Growth Taxed	0.99	1.78	8.30	10.13	5.35	6.77	6.97	7.40	8.15	7.45
Balanced Taxed	0.88	1.62	7.16	8.51	4.33	5.30	5.42	5.83	6.59	
Capital Stable Taxed	0.74	1.01	4.97	5.48	2.44	3.40	3.56	4.08	5.11	5.18
MySuper	0.99	1.79	8.31	10.10	5.33	6.68	6.80	7.14		
Future Focus Taxed	1.45	0.58	1.53	3.82	2.72	6.28				
Index Diversified Taxed	1.47	1.39	10.14							
Australian Shares Taxed	0.61	3.08	10.06	12.57	7.54	8.11	8.35	7.77	9.24	8.60
Overseas Shares Taxed	1.75	2.29	15.60	19.48	6.13	11.37	10.53	11.16	11.21	8.05
Diversified Fixed Interest Taxed	0.56	-0.59	1.63	0.65	-0.97	0.48	1.01	1.96	3.55	3.88
Cash Taxed	0.35	0.96	3.62	3.90	2.13	1.50	1.56	1.67	2.25	3.01
Defined Benefit Option Taxed	0.91	1.61	6.90	8.14	4.27	5.56	5.85	6.52	7.66	7.07

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Retirement Income	Monthly return (%)	Quarterly return (%)	FYTD return (%)	1-year return (%)	3-year annualised return (%)	5-year annualised return (%)	7-year annualised return (%)	10-year annualised return (%)	15-year annualised return (%)	20-year annualised return (%)
Growth Plus Untaxed	1.10	2.18	11.61	14.64	7.12	9.84	10.07	10.09	11.16	9.26
Growth Untaxed	1.04	1.98	10.62	13.16	6.51	8.71	8.95	8.93	9.88	
Balanced Growth Untaxed	0.92	1.58	8.82	10.81	5.72	7.15	7.60	7.80	8.81	8.08
Balanced Untaxed	0.84	1.40	7.64	9.10	4.49	5.66	6.02	6.30	7.31	
Capital Stable Untaxed	0.74	0.88	5.42	6.02	2.65	3.75	4.07	4.38	5.65	5.75
Future Focus Untaxed	1.40	0.74	1.04	2.89	2.29	6.69				
Index Diversified Untaxed	1.71	1.60	11.67							
Australian Shares Untaxed	0.35	2.73	10.93	13.33	8.24	8.94	9.32	8.40	10.11	9.33
Overseas Shares Untaxed	1.68	1.97	16.30	20.65	6.46	12.18	11.48	12.15	12.45	8.89
Diversified Fixed Interest Untaxed	0.58	-0.50	2.31	1.11	-1.02	0.62	1.27	2.18	4.07	4.45
Cash Untaxed	0.40	1.14	4.26	4.56	2.50	1.75	1.83	1.95	2.63	3.51

For information on investment objectives and strategies of our investment options, please refer to the Equip Super website or an Equip PDS. For periods greater than 1 year, returns are compound annualised returns. Returns are net of tax and investment fees.

Equip MySuper was introduced on 1 August 2013.

Past performance is not an indicator of future performance.

Produced by Togethr Trustees (ABN 64 006 964 049, AFSL 246383), the trustee of Equip Super Superannuation Fund (ABN 33 813 823 017)