

# 50+ Performance

Date prepared: 22/06/2018

## Latest returns for the period ended 31 May 2018

| Investment option    | Rolling 1mth | Rolling 3mth | FYTD <sup>1</sup> | Rolling 1yr | Rolling 3yrs <sup>2</sup> | Rolling 5yrs <sup>2</sup> | Rolling 7yrs <sup>2</sup> | Rolling 10yrs <sup>2</sup> |
|----------------------|--------------|--------------|-------------------|-------------|---------------------------|---------------------------|---------------------------|----------------------------|
| Property             | 1.00%        | 2.96%        | 9.68%             | 11.06%      | -                         | -                         | -                         | -                          |
| Growth               | 0.20%        | 1.42%        | 10.67%            | 10.21%      | 7.76%                     | 11.04%                    | 10.18%                    | 7.19%                      |
| Sustainable          | 0.32%        | 1.37%        | 7.23%             | 7.07%       | -                         | -                         | -                         | -                          |
| Balanced             | 0.16%        | 1.23%        | 8.91%             | 8.61%       | 7.08%                     | 9.63%                     | 9.14%                     | 7.27%                      |
| Moderate             | 0.15%        | 0.91%        | 5.86%             | 5.96%       | -                         | -                         | -                         | -                          |
| Conservative         | 0.02%        | 0.63%        | 4.28%             | 4.36%       | 4.41%                     | 6.06%                     | 6.35%                     | 6.07%                      |
| Australian shares    | 1.15%        | 1.31%        | 12.31%            | 12.28%      | -                         | -                         | -                         | -                          |
| International shares | -0.26%       | 1.28%        | 12.09%            | 10.27%      | -                         | -                         | -                         | -                          |
| Fixed interest       | -0.03%       | 0.25%        | 1.96%             | 1.73%       | -                         | -                         | -                         | -                          |
| Cash                 | 0.18%        | 0.52%        | 1.98%             | 2.13%       | 2.30%                     | 2.62%                     | 3.07%                     | 3.86%                      |

- <sup>1</sup> FYTD refers to the financial year to date. This shows how the option has performed since 1 July this financial year.
- <sup>2</sup> Returns shown for periods longer than one year are compound averages to give you an idea of the average return generated each year over the period, assuming that the investment had grown at a steady rate over this time. It's important to note that returns can vary significantly from year-to-year.

Options will only show performance history since they were introduced by Tasplan.

Property was introduced on 1 April 2017.

Moderate, Sustainable, Australian shares, International shares, Fixed interest were introduced on 1 December 2015.

Past performance is not necessarily an indication of future returns. Please note that this performance information shows net investment returns, that is, after tax and investment fees have been paid.

The trustee of Tasplan Super (ABN 14 602 032 302) is Tasplan Pty Ltd (ABN 13 009 563 062). AFSL 235391.

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**Your super fund's performance has a big impact on how much money you'll have at retirement. So, how do you know if your fund is a great performer?**

## How to compare super funds

- Look for good performance over a five- or 10-year period rather than exceptional performance for just a year or so. Super is a long-term investment.
- Be sure to factor in fees when you're checking performance figures – but remember that low-fee funds may not perform as well and may offer less in the way of products and services.

So, the trick is to find a fund with good returns and low fees – plus the benefits you need.