

# Savings Products - Investment Returns

as at 31 May 2022

Fund Name	Inception Date	Performance to 31 May 2022 (%)				Performance to 31 May 2022 (%)						Performance for Calendar Year (%)						Unit Exit Price
		1 Month	3 Month	6 Month	9 Month	1 Year	2 Years	3 Years	5 Years	7 Years	Since Inception	2021	2020	2019	2018	2017	2016	
Goldline*																		
<b>Investment &amp; Protection Plan</b>																		
Balanced	Aug-1995	-1.83	-1.75	-7.36	-6.00	-1.9	4.5	4.1	4.8	4.8	4.1	3.8	4.7	16.0	-2.9	11.7	4.3	29.605
Aggressive	Aug-1995	-2.43	-1.69	-8.77	-6.33	-0.8	7.2	6.0	6.5	6.1	4.2	7.2	5.4	20.3	-4.3	14.7	4.7	29.754
Spread Managers	Sep-1995	-2.20	-4.12	-10.53	-10.72	-8.0	0.7	1.0	2.8	2.4	3.1	-0.9	3.3	14.5	-2.0	9.9	2.4	22.300
Protected	Aug-1995	0.28	0.83	1.29	2.27	2.9	2.3	2.4	2.7	3.1	3.2	2.6	1.9	2.8	3.4	3.3	4.1	23.422
<b>Personal Plan</b>																		
Balanced	Aug-1995	-1.83	-1.73	-7.34	-5.98	-1.9	4.5	4.1	4.8	4.8	4.1	3.8	4.7	16.0	-2.9	11.7	4.3	29.664
Aggressive	Aug-1995	-2.43	-1.70	-8.79	-6.35	-0.8	7.2	6.0	6.4	6.0	4.2	7.2	5.3	20.3	-4.3	14.7	4.7	29.804
Spread Managers	Sep-1995	-2.20	-4.13	-10.53	-10.73	-8.0	0.6	1.0	2.8	2.4	3.1	-0.9	3.3	14.5	-2.0	9.9	2.4	22.365
Protected	Aug-1995	0.28	0.83	1.29	2.27	2.9	2.3	2.4	2.7	3.1	3.2	2.6	1.9	2.8	3.4	3.3	4.1	23.422
<b>Personal Plan (Locked-In)</b>																		
Managed	Nov-1996	-1.78	-1.59	-7.13	-5.58	-1.3	5.1	4.7	5.5	5.4	4.1	4.4	5.3	16.7	-2.3	12.3	4.9	27.650
Equities	Nov-1996	-4.04	-0.22	-7.10	-7.02	-2.0	8.7	5.7	8.9	9.1	5.1	-1.9	9.8	25.4	-0.1	20.8	9.6	35.324
Protected	Nov-1996	0.32	0.97	1.52	2.68	3.5	2.9	3.0	3.3	3.7	3.3	3.3	2.5	3.3	3.9	3.9	4.6	22.992
<b>Premier Plan</b>																		
Equities	Sep-1996	-4.09	-0.37	-7.33	-7.44	-2.6	8.0	5.1	8.3	8.6	5.4	-2.5	9.1	24.6	-0.7	20.1	9.1	38.939
Balanced	Sep-1996	-1.83	-1.73	-7.34	-5.98	-1.9	4.5	4.1	4.8	4.8	4.3	3.8	4.7	16.0	-2.9	11.7	4.3	29.664
Aggressive	Sep-1996	-2.43	-1.70	-8.79	-6.35	-0.8	7.2	6.0	6.4	6.0	4.3	7.2	5.3	20.3	-4.3	14.7	4.7	29.804
Spread Managers	Sep-1996	-2.20	-4.13	-10.53	-10.73	-8.0	0.6	1.0	2.8	2.4	3.2	-0.9	3.3	14.5	-2.0	9.9	2.4	22.365
Protected	Sep-1996	0.28	0.85	1.30	2.23	2.9	2.3	2.4	2.7	3.1	3.3	2.6	1.9	2.7	3.3	3.2	4.0	22.923
Original Goldline*																		
<b>Investment &amp; Protection Plan</b>																		
Managed	Jan-1991	-1.83	-1.74	-7.35	-5.99	-1.9	4.5	4.1	4.8	4.8	4.6	3.8	4.7	16.0	-3.2	11.7	4.3	40.293
Equities	Jan-1991	-4.09	-0.37	-7.33	-7.44	-2.6	8.0	5.1	8.3	8.6	6.4	-2.5	9.1	24.6	-0.7	20.1	9.2	69.534
International	Jan-1991	-2.76	-2.26	-11.49	-6.86	1.2	11.1	9.4	8.4	7.2	5.2	15.5	6.2	25.9	-8.0	18.1	4.1	47.962
Conservative	Nov-1992	-0.76	-1.57	-4.71	-4.60	-2.7	0.5	1.3	2.2	2.5	3.8	0.2	2.6	8.3	-0.9	6.4	2.8	29.688
Protected	Jan-1991	0.28	0.84	1.31	2.25	2.9	2.2	2.4	2.7	3.1	3.6	2.6	1.9	2.7	3.3	3.2	4.0	29.572
<b>Personal Plan</b>																		
Managed	Jan-1991	-1.77	-1.57	-7.08	-5.50	-1.2	5.2	4.8	5.6	5.5	5.3	4.6	5.4	16.8	-2.2	12.4	5.1	50.275
Equities	Jan-1991	-4.03	-0.20	-7.08	-6.96	-1.9	8.8	5.8	9.0	9.3	7.1	-1.8	9.9	25.5	-0.0	21.0	9.9	85.208
International	Jan-1991	-2.70	-2.07	-11.20	-6.32	2.0	11.9	10.2	9.2	8.0	5.9	16.4	7.0	26.9	-7.3	19.0	4.8	58.792
Property	Jan-1991	-8.80	-3.10	-13.29	-8.65	-1.4	12.0	3.7	5.3	5.2	3.7	18.8	-9.3	26.7	-6.3	9.9	3.7	31.027
Conservative	Nov-1992	-0.70	-1.40	-4.43	-4.09	-2.0	1.3	2.0	2.9	3.1	4.5	1.0	3.3	9.0	-0.2	7.1	3.5	35.982
Protected	Jan-1991	0.34	1.00	1.57	2.77	3.6	2.9	3.1	3.4	3.8	4.2	3.3	2.6	3.4	4.0	4.0	4.7	36.180

\* Closed to new policies

These returns should be read in conjunction with the notes below:

The returns stated represent in each case and for each fund, the percentage change in the unit price over the period.

These are not necessarily the returns individual investors will receive as this will depend on the prices at which units are purchased and sold, the dates of these transactions and any additional contributions or withdrawals made during the period. Past performance is not indicative of future performance and is not guaranteed by any party. Returns are after the annual management fee and tax.

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<b>Link-Save/Link-Save Plus*</b>																		
Managed	Apr-1982	-1.83	-1.75	-7.33	-5.95	-1.8	4.6	4.2	4.9	4.9	6.3	3.9	4.7	16.0	-2.8	11.7	4.4	114.358
Protected	May-1988	0.28	0.83	1.29	2.26	2.9	2.3	2.4	2.7	3.1	4.0	2.6	1.9	2.7	3.3	3.2	4.0	37.905
Pension	Oct-1984	-1.83	-1.74	-7.35	-6.00	-1.9	4.5	4.1	4.8	4.8	5.8	3.7	4.6	16.0	-2.9	11.7	4.3	82.066
<b>Flexipol*</b>																		
<b>Ordinary Policies</b>																		
Protected	Sep-1981	0.32	0.96	1.51	2.65	3.4	2.8	2.9	3.3	3.6	5.7	3.2	2.5	3.3	3.9	3.7	4.2	28.958
Aggressive	Nov-2001	-2.43	-1.69	-8.77	-6.33	-0.8	7.2	6.0	6.5	6.1	4.2	7.2	5.4	20.3	-4.3	14.7	4.7	29.754
Spread Managers	Nov-2001	-2.20	-4.12	-10.53	-10.72	-8.0	0.7	1.0	2.8	2.4	2.6	-0.9	3.3	14.5	-2.0	9.9	2.4	22.300

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