

# Savings Products - Investment Returns

as at 31 May 2020



Fund Name	Inception Date	Performance to 31 May 2020 (%)				Performance to 31 May 2020 (%)						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	2019	2018	2017	2016	2015		2014
<b>Goldline*</b>																		
<b>Investment &amp; Protection Plan</b>																		
Balanced	Aug-1995	2.54	-1.39	-3.67	0.31	3.3	4.1	5.1	4.9	6.2	4.1	16.0	-2.9	11.7	4.3	5.6	9.1	27.110
Aggressive	Aug-1995	3.22	-1.68	-4.87	0.50	3.7	4.5	6.0	5.6	7.3	3.9	20.3	-4.3	14.7	4.7	6.5	10.0	25.905
Spread Managers	Sep-1995	1.87	-1.98	-4.43	-0.94	1.6	3.9	4.2	3.2	4.3	3.2	14.5	-2.0	9.9	2.4	1.0	7.4	22.007
Protected	Aug-1995	0.15	0.58	1.24	2.02	2.6	2.8	3.0	3.5	3.7	3.3	2.8	3.4	3.3	4.1	5.0	4.5	22.400
<b>Personal Plan</b>																		
Balanced	Aug-1995	2.54	-1.38	-3.66	0.32	3.3	4.1	5.1	4.9	6.2	4.1	16.0	-2.9	11.7	4.3	5.6	9.1	27.162
Aggressive	Aug-1995	3.22	-1.76	-4.95	0.42	3.6	4.4	6.0	5.6	7.3	3.9	20.3	-4.3	14.7	4.7	6.5	10.0	25.959
Spread Managers	Sep-1995	1.87	-1.94	-4.39	-0.90	1.7	3.9	4.2	3.2	4.3	3.3	14.5	-2.0	9.9	2.4	1.0	7.5	22.083
Protected	Aug-1995	0.15	0.58	1.24	2.02	2.6	2.8	3.0	3.5	3.7	3.3	2.8	3.4	3.3	4.1	5.0	4.5	22.400
<b>Personal Plan (Locked-In)</b>																		
Managed	Nov-1996	2.59	-1.23	-3.37	0.77	3.9	4.7	5.7	5.5	6.6	4.0	16.7	-2.3	12.3	4.9	5.6	9.0	25.016
Equities	Nov-1996	3.77	-5.27	-8.63	-2.90	0.1	6.5	9.1	9.3	9.7	4.8	25.4	-0.1	20.8	9.6	7.4	11.5	29.915
Protected	Nov-1996	0.20	0.72	1.54	2.48	3.2	3.4	3.6	4.0	4.0	3.4	3.3	3.9	3.9	4.6	5.0	4.5	21.732
<b>Premier Plan</b>																		
Equities	Sep-1996	3.72	-5.41	-8.90	-3.33	-0.6	5.8	8.5	8.8	9.3	5.2	24.6	-0.7	20.1	9.1	7.3	11.5	33.363
Balanced	Sep-1996	2.54	-1.38	-3.66	0.32	3.3	4.1	5.1	4.9	6.2	4.3	16.0	-2.9	11.7	4.3	5.6	9.1	27.162
Aggressive	Sep-1996	3.22	-1.76	-4.95	0.42	3.6	4.4	6.0	5.6	7.3	4.1	20.3	-4.3	14.7	4.7	6.5	10.0	25.959
Spread Managers	Sep-1996	1.87	-1.94	-4.39	-0.90	1.7	3.9	4.2	3.2	4.3	3.4	14.5	-2.0	9.9	2.4	1.0	7.5	22.083
Protected	Sep-1996	0.16	0.59	1.26	2.02	2.6	2.8	3.0	3.4	3.6	3.4	2.7	3.3	3.2	4.0	4.9	4.5	21.919
<b>Original Goldline*</b>																		
<b>Investment &amp; Protection Plan</b>																		
Managed	Jan-1991	2.54	-1.38	-3.66	0.32	3.3	3.9	5.0	4.9	6.1	4.6	16.0	-3.2	11.7	4.3	5.7	9.0	36.892
Equities	Jan-1991	3.72	-5.41	-8.90	-3.34	-0.6	5.8	8.5	8.8	9.3	6.3	24.6	-0.7	20.1	9.2	7.3	11.5	59.577
International	Jan-1991	4.30	-0.69	-5.41	2.30	6.1	4.4	6.6	5.7	8.6	4.8	25.9	-8.0	18.1	4.1	7.2	11.6	38.871
Conservative	Nov-1992	1.23	-0.29	-1.03	0.62	2.8	3.1	3.3	3.2	3.9	4.0	8.3	-0.9	6.4	2.8	3.9	6.3	29.364
Protected	Jan-1991	0.15	0.58	1.23	2.01	2.6	2.8	3.0	3.5	3.7	3.6	2.7	3.3	3.2	4.0	5.0	4.5	28.286
<b>Personal Plan</b>																		
Managed	Jan-1991	2.60	-1.20	-3.31	0.85	4.0	4.9	5.8	5.7	6.9	5.3	16.8	-2.2	12.4	5.1	6.3	9.7	45.392
Equities	Jan-1991	3.78	-5.25	-8.59	-2.83	0.1	6.6	9.2	9.5	10.1	7.0	25.5	-0.0	21.0	9.9	8.1	12.3	71.996
International	Jan-1991	4.36	-0.50	-5.06	2.87	6.8	5.2	7.4	6.5	9.3	5.4	26.9	-7.3	19.0	4.8	7.9	12.3	46.934
Property	Jan-1991	1.42	-16.47	-19.26	-14.13	-11.1	-1.0	1.1	2.6	2.3	3.2	26.7	-6.3	9.9	3.7	3.4	1.6	24.756
Conservative	Nov-1992	1.29	-0.12	-0.69	1.14	3.5	3.8	4.0	3.9	4.6	4.7	9.0	-0.2	7.1	3.5	4.3	7.0	35.094
Protected	Jan-1991	0.21	0.75	1.58	2.52	3.3	3.5	3.7	4.2	4.4	4.3	3.4	4.0	4.0	4.7	5.7	5.2	34.137

\* 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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A disclosure statement is available on request and free of charge from your adviser.

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<b>Link-Save/Link-Save Plus*</b>																		
Managed	Apr-1982	2.53	-1.37	-3.64	0.34	3.3	4.2	5.1	5.0	6.2	6.4	16.0	-2.8	11.7	4.4	5.6	9.0	104.538
Protected	May-1988	0.15	0.58	1.24	2.02	2.6	2.8	3.0	3.5	3.7	4.1	2.7	3.3	3.2	4.0	5.0	4.5	36.244
Pension	Oct-1984	2.54	-1.38	-3.66	0.30	3.3	4.1	5.1	4.9	6.2	5.8	16.0	-2.9	11.7	4.3	5.6	8.9	75.212
<b>Flexipol*</b>																		
<b>Ordinary Policies</b>																		
Protected	Sep-1981	0.20	0.72	1.54	2.47	3.2	3.4	3.6	4.0	4.5	5.8	3.3	3.9	3.7	4.2	6.2	6.1	27.388
Aggressive	Nov-2001	3.22	-1.68	-4.87	0.50	3.7	4.5	6.0	5.6	7.3	3.9	20.3	-4.3	14.7	4.7	6.5	10.0	25.905
Spread Managers	Nov-2001	1.87	-1.98	-4.43	-0.94	1.6	3.9	4.2	3.2	4.3	2.9	14.5	-2.0	9.9	2.4	1.0	7.4	22.007

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