

## Investment Bonds - Investment Returns

as at 31 March 2020



Fund Name	Inception Date	Performance to 31 March 2020 (%)				Performance to 31 March 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>Retirement Income Bond*</b>																		
	Jun-1990	0.28	0.83	1.67	2.51	3.4	3.6	3.7	3.9	3.6	3.5	3.4	4.0	3.9	4.4	4.0	3.2	27.484
<b>Zenith Bond*</b>																		
Mortgage Portfolio	May-1995	0.10	0.25	0.45	0.72	1.0	1.2	1.3	1.6	2.1	3.2	1.1	1.4	1.4	1.8	2.5	6.9	21.996
Fixed Interest Portfolio	Sep-1993	-0.85	0.89	-0.59	0.89	2.1	2.6	2.5	2.2	2.3	3.5	3.0	1.2	2.9	2.3	2.6	5.1	24.983
Conservative Portfolio	Sep-1993	-3.98	-4.09	-4.08	-2.24	-0.3	1.8	2.3	2.5	3.4	3.3	7.6	-0.8	6.0	2.9	3.7	5.7	23.488
Managed Portfolio	Sep-1993	-10.20	-12.25	-10.78	-7.65	-3.9	1.7	3.1	3.9	6.2	3.1	18.6	-3.8	13.9	4.8	6.4	8.5	22.421
Property Portfolio	Apr-1995	-12.46	-13.50	-13.26	-10.52	-10.6	-2.2	-0.8	1.0	2.7	4.4	12.6	-4.2	3.5	3.9	7.5	13.0	29.557
Shares Portfolio	Sep-1993	-16.24	-18.38	-17.60	-14.71	-9.4	1.4	3.9	5.7	6.9	4.4	23.3	-1.2	19.0	8.9	7.0	11.6	31.558
<b>Prosperity Bond*</b>																		
Protected	Oct-1987	0.28	0.83	1.66	2.51	3.4	3.6	3.7	3.9	3.5	3.9	3.4	4.0	3.9	4.3	3.9	3.2	34.038
Managed Portfolio	Oct-1984	-8.42	-9.74	-8.87	-6.17	-3.0	1.5	2.8	3.4	5.1	4.7	14.5	-2.6	11.2	4.4	5.4	7.8	51.679
Property Portfolio	Oct-1984	-21.67	-23.26	-22.83	-17.68	-17.9	-3.4	-1.2	0.3	0.4	2.7	25.3	-7.4	6.5	5.9	1.6	0.6	26.039
Shares Portfolio	Aug-1986	-16.23	-18.37	-17.59	-14.70	-9.4	1.4	4.1	5.8	7.0	4.2	23.3	-1.2	19.5	8.9	7.1	11.5	39.240
International Portfolio	May-1987	-11.15	-14.35	-11.71	-7.88	-3.6	1.3	3.4	4.1	7.7	5.5	23.1	-6.6	17.8	4.3	7.4	9.0	58.910

\* 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.