



## Models Performance Summary

31 October 2024

### WealthFoundations Super & TTR

Investment Name	1 month (%)	3 months (%)	6 months (%)	1 year (%)	3 years (% p.a.)	5 years (% p.a.)	7 years (% p.a.)	Since inception (% p.a.)
Cautious 30 (Super & TTR)	-0.37	0.75	3.82	10.05				3.76
IPS Active Dynamic 30 (Super & TTR)	-0.56	0.56	3.20	9.31	2.08	1.94	2.43	2.98
IPS Index Dynamic 30 (Super & TTR)	-0.69	0.64	3.83	9.95	0.72	1.33	2.28	2.86
IPS Active Strategic 30 (Super & TTR)	-0.42	0.66	3.43	10.15	2.67	2.83		3.53
IPS Index Strategic 30 (Super & TTR)	-0.33	0.78	4.05	10.52	1.89	2.29		3.36
Prudent 50 (Super & TTR)	-0.11	1.00	5.05	13.85				5.90
IPS Active Dynamic 50 (Super & TTR)	-0.26	0.77	4.13	12.21	3.10	3.41	3.57	4.06
IPS Index Dynamic 50 (Super & TTR)	-0.08	0.99	5.06	13.43	2.45	3.32	3.98	4.28
IPS Active Strategic 50 (Super & TTR)	-0.26	0.92	4.07	13.04	3.95	4.18		5.01
IPS Index Strategic 50 (Super & TTR)	-0.09	1.17	5.32	14.11	3.12	3.72		5.03
IPS Index Base 50 (Super & TTR)	0.38	1.10	5.20	14.25	4.48	5.04		4.98
Assertive 70 (Super & TTR)	0.12	1.05	5.84	17.02				7.76
IPS Active Dynamic 70 (Super & TTR)	0.09	1.13	4.94	15.03	4.33	4.73	4.71	5.21
IPS Index Dynamic 70 (Super & TTR)	0.43	1.44	6.39	17.20	4.13	5.13	5.59	5.75
IPS Active Strategic 70 (Super & TTR)	-0.04	1.28	4.81	16.26	5.26	5.58		6.54
IPS Index Strategic 70 (Super & TTR)	0.29	1.60	6.63	17.86	4.67	5.39		6.90
IPS Index Base 70 (Super & TTR)	0.90	1.40	6.42	18.00	6.35	6.98		7.02
Aggressive 95 (Super & TTR)	0.46	1.41	6.80	20.88				10.42
IPS Active Dynamic 90 (Super & TTR)	0.49	1.57	5.92	18.46	5.82	6.53	6.36	6.73
IPS Index Dynamic 90 (Super & TTR)	1.04	1.94	7.84	21.15	6.05	6.98	7.33	7.31
IPS Active Strategic 85 (Super & TTR)	0.15	1.51	5.46	18.49	6.45	6.77		7.77
IPS Index Strategic 85 (Super & TTR)	0.63	1.95	7.56	20.61	6.13	6.83		8.47
IPS Active Strategic 100 (Super & TTR)	0.35	1.76	5.95	20.64	7.56	7.88		8.97
IPS Index Strategic 100 (Super & TTR)	0.91	2.30	8.57	23.51	7.36	8.04		9.83
IPS Index Base 100 (Super & TTR)	1.31	2.19	8.94	24.48	8.46	8.71		8.60
IPS Money Market (Super & TTR)	0.36	1.00	1.98	3.99	2.56	1.62	1.49	1.44
IPS Conservative Growth (Super & TTR)	0.92	2.89	10.44	22.38	8.55	5.48	7.71	8.49
IPS Index Shares (Super & TTR)	1.17	2.26	7.74	21.94	6.65	7.98	7.90	7.94
Guaranteed Cash (Super & TTR)	0.34	0.97	1.94	3.88	2.44	1.54	1.37	2.53
IPS Income (Super & TTR)	-1.10	0.10	2.38	6.74	-0.51	-0.37	0.93	1.76
IPS Active International Shares (Super & TTR)	1.47	1.73	6.38	19.13	7.35	6.54	6.03	6.60
IPS Active Australian Shares (Super & TTR)	-1.07	2.96	5.09	22.81	6.28	8.76	8.39	8.21

## WealthFoundations Pension

Investment Name	1 month	3 months	6 months	1 year	3 years (p.a.)	5 years (p.a.)	7 years (p.a.)	Since inception (p.a.)
Cautious 30 (Pension)	-0.43	0.87	4.43	11.65				4.68
IPS Active Dynamic 30 (Pension)	-0.69	0.62	3.70	10.79	2.49	2.26	2.80	3.50
IPS Index Dynamic 30 (Pension)	-0.84	0.72	4.38	11.45	1.11	1.67	2.71	3.47
IPS Active Strategic 30 (Pension)	-0.52	0.74	3.94	11.73	3.13	3.25		4.04
IPS Index Strategic 30 (Pension)	-0.43	0.88	4.60	12.01	2.34	2.69		3.90
Prudent 50 (Pension)	-0.13	1.14	5.77	15.95				7.01
IPS Active Dynamic 50 (Pension)	-0.34	0.85	4.70	14.08	3.59	3.86	4.05	4.71
IPS Index Dynamic 50 (Pension)	-0.17	1.10	5.68	15.24	2.92	3.80	4.56	5.08
IPS Active Strategic 50 (Pension)	-0.33	1.02	4.62	15.01	4.47	4.71		5.63
IPS Index Strategic 50 (Pension)	-0.17	1.30	5.97	16.06	3.63	4.23		5.72
IPS Index Base 50 (Pension)	0.42	1.26	5.88	16.27	5.14	5.76		5.78
Assertive 70 (Pension)	0.14	1.18	6.62	19.48				9.02
IPS Active Dynamic 70 (Pension)	0.06	1.25	5.58	17.27	4.87	5.26	5.30	6.01
IPS Index Dynamic 70 (Pension)	0.40	1.59	7.12	19.44	4.66	5.72	6.36	6.78
IPS Active Strategic 70 (Pension)	-0.08	1.42	5.43	18.70	5.85	6.22		7.27
IPS Index Strategic 70 (Pension)	0.26	1.77	7.39	20.26	5.24	6.02		7.74
IPS Index Base 70 (Pension)	0.96	1.57	7.19	20.60	6.92			7.72
Aggressive 95 (Pension)	0.51	1.56	7.55	23.65				11.77
IPS Active Dynamic 90 (Pension)	0.52	1.74	6.65	21.19	6.43	7.21	7.13	7.70
IPS Index Dynamic 90 (Pension)	1.09	2.15	8.68	23.86	6.65	7.68	8.29	8.56
IPS Active Strategic 85 (Pension)	0.15	1.67	6.13	21.22	7.12	7.51		8.60
IPS Index Strategic 85 (Pension)	0.65	2.15	8.39	23.34	6.77	7.55		9.44
IPS Active Strategic 100 (Pension)	0.38	1.95	6.66	23.67	8.29	8.70		9.89
IPS Index Strategic 100 (Pension)	0.96	2.55	9.49	26.61	8.06	8.84		10.90
IPS Index Base 100 (Pension)	1.48	2.47	10.05	27.89	9.16			9.50
IPS Money Market (Pension)	0.40	1.14	2.28	4.59	2.96	1.87	1.73	1.69
IPS Conservative Growth (Pension)	1.05	3.32	12.06	26.13	9.21	5.93	8.71	9.61
IPS Index Shares (Pension)	1.25	2.48	8.46	24.64	7.20	8.73	8.75	9.26
Guaranteed Cash (Pension)	0.40	1.13	2.25	4.56	2.88	1.81	1.61	1.49
IPS Income (Pension)	-1.32	0.10	2.82	7.95	-0.18	-0.17	1.23	2.19
IPS Active International Shares (Pension)	1.62	1.89	7.04	21.69	8.05	7.09	6.53	7.54
IPS Active Australian Shares (Pension)	-1.20	3.28	5.67	26.23	6.84	9.76	9.43	9.41

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