

WealthFoundations

As of 30/06/2021

Performance data is after applicable fees and taxes, and assumes the reinvestment of distributions. Past performance is not indicative of future performance. Due to the flexibility of rebalancing and variations between accounts, performance shown is indicative only and assumes that there are no deposits, withdrawals nor exceptions to regular rebalancing in the model portfolio.

Volatility data represents the range of price change a security experiences over a given period of time.

Index Base Investment Options (Pension) - Total Returns

	1 Month (%)	3 Months (%)	6 Months (%)	Since Inception (%)	Inception Date
IPS Index Base 50 (Pension)	2.14	5.02	6.95	7.05	1/10/2019
IPS Index Base 70 (Pension)	2.80	6.62	10.21	10.48	10/12/2019
IPS Index Base 100 (Pension)	3.71	8.92	14.62	9.75	27/11/2019

Index Base Investment Options (Pension) - Volatility

	1 Month (%)	3 Months (%)	6 Months (%)	Since Inception	Inception Date
IPS Index Base 50 (Pension)			3.67	7.91	1/10/2019
IPS Index Base 70 (Pension)			4.39	10.49	10/12/2019
IPS Index Base 100 (Pension)			6.08	16.82	27/11/2019

Index Base Investment Options (Super) - Total Returns

	1 Month (%)	3 Months (%)	6 Months (%)	Since Inception	Inception Date
IPS Index Base 50 (Super)	1.84	4.34	6.02	5.76	9/09/2019
IPS Index Base 70 (Super)	2.40	5.65	8.73	8.00	9/09/2019
IPS Index Base 100 (Super)	3.19	7.59	12.55	8.34	9/09/2019

Index Base Investment Options (Super) - Volatility

	1 Month (%)	3 Months (%)	6 Months (%)	Since Inception	Inception Date
IPS Index Base 50 (Super)			3.13	6.96	9/09/2019
IPS Index Base 70 (Super)			3.70	9.55	9/09/2019
IPS Index Base 100 (Super)			5.20	14.50	9/09/2019

Important Information

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