Strategyfirst

INDEPENDENT FINANCIAL ADVICE

Independent Research of Australian Superannuation Funds Performance

Completed by

Dr Steve Garth

Princpal of Principia
Investment Consultants



Data to 30 June 2026

Australian Superannuation Funds

Strategyfirst
INDEPENDENT FINANCIAL ADVICE

We are often asked *"How does the performance of Strategy First's portfolios stack up against other super funds?"* Fortunately, the answer is: *"They stack up very well"*

As Independent Chairman of our Investment Committee, Dr Steve Garth has created a comparison of superannuation funds with similar risk profiles (allowing for a fair comparison). Of the 44 funds with available data, the table below shows the worst performers, the top performers … and Strategy First's portfolio.

The results speak for themselves.

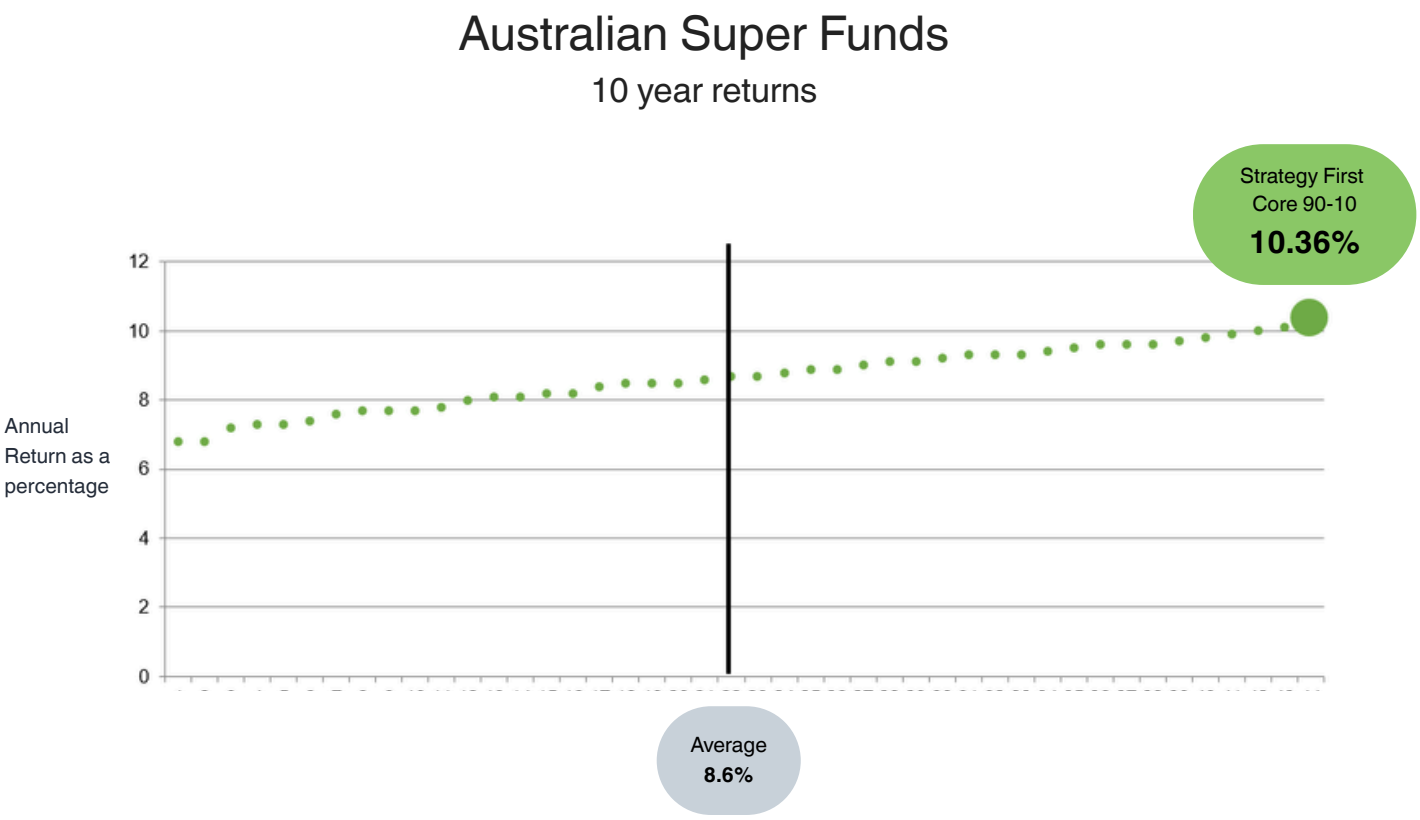
Australian Superannuation Funds Growth Assets > 80%*	Annualised 10-year return (%)
WORST	
MLC MK Rollover FS Growth TR in AU	6.69
Perpetual Select Super Growth Investment Option TR in AU	6.75
Perpetual Select Super High Growth Investment Option TR in AU	7.19
MLC MK Rollover Growth TR in AU	7.22
MLC MK Super GS Own Trustee Horizon 5 Growth Portfolio TR	7.22
Perpetual DA High Growth Superannuation FE TR in AU	7.29
BEST	
Australian Super High Growth Option TR in AU	9.61
ANZ ACS High Growth Index TR in AU	9.66
Legal Super High Growth Option TR in AU	9.69
CFS CFS FC W PSup CFS Enhanced Index High Growth TR in AU	9.9
MLC MasterKey Super Fundamentals MLC High Growth TR in AU	9.99
ART Australian Retirement Trust High Growth TR in AU	10.07
Perpetual WF Super Perpetual Global Allocation Alpha TR in AU	10.15
Portfolio: Strategy First Core 90 10 in AU	**10.36**

IMPORTANT WARNING – Past performance is not a reliable indicator of future performance and is used here for illustrative purposes only.

**dataset is the FE Analytics Australian Superannuation Aggressive (growth assets > 80%) Sector to 30 June 2026*

Australian Superannuation Funds

Strategyfirst
INDEPENDENT FINANCIAL ADVICE



IMPORTANT WARNING – Past performance is not a reliable indicator of future performance and is used here for illustrative purposes only.

**dataset is the FE Analytics Australian Superannuation Aggressive (growth assets > 80%) Sector to 30 June 2026*