

IWIinvestor SRI Model Portfolios Performance - December 2021



Model Portfolios	1Y	3Y	5Y	7Y	10Y
Defensive	6.1%	5.5%	5.3%	5.9%	6.1%
D (Benchmark)	4.9%	4.6%	4.5%	5.5%	5.4%
Conservative	9.0%	6.9%	6.6%	6.9%	6.9%
C (Benchmark)	7.6%	5.8%	5.7%	6.5%	6.2%
Moderate	11.9%	8.1%	8.0%	8.2%	8.1%
M (Benchmark)	10.4%	7.0%	7.1%	7.6%	7.3%
Balanced	15.0%	9.3%	9.1%	9.0%	8.9%
B (Benchmark)	13.2%	8.1%	8.2%	8.5%	8.0%
Growth	19.6%	10.8%	10.5%	10.1%	9.9%
G (Benchmark)	17.5%	9.6%	9.6%	9.5%	8.9%
High Growth	25.9%	12.7%	12.4%	11.7%	11.3%
HG (Benchmark)	23.5%	11.4%	11.5%	11.0%	10.2%
NZX90D	0.3%	1.2%	1.5%	2.0%	2.2%
CPI	2.0%	1.6%	1.6%	1.2%	1.2%

*Benchmarks; NZ 90 Day Bank Bill, NZX NZ Corp A Grade, BBgBarc Global Agg Hdg NZD, NZX 50, ASX 200, *DM xAus Hdg NZD, MSCI World, MSCI EM, *DM REIT Hdg NZD*

Past performance is not a guarantee of future performance