

Market Index Returns Australia



As of Date: 29/02/2024

	Return (%)								
	Financial YTD	Calendar YTD	1 Month	3 Month	6 Month	1 Year	3 Year	5 Year	10 Year
Australian Cash and Bonds									
Morningstar AU Trsy Bd GR AUD	0.5	-0.3	-0.4	2.7	1.9	2.8	-2.0	-0.2	2.4
Morningstar AU Core Bd GR AUD	1.1	-0.2	-0.4	2.7	2.1	3.5	-1.7	0.2	2.5
Morningstar AUD 1M Cash GR AUD	2.8	0.7	0.3	1.1	2.1	4.0	1.8	1.4	1.7
RBA Bank accepted Bills 90 Days	3.2	0.7	0.3	1.1	2.1	4.1	2.1	1.5	1.8
Bloomberg AusBond Bank 0+Y TR AUD	2.9	0.7	0.3	1.1	2.1	4.1	2.0	1.5	1.8
Bloomberg AusBond Composite 0+Y TR AUD	1.2	-0.1	-0.3	2.6	2.1	3.5	-1.4	0.3	2.5
Australian Equity									
Morningstar Australia GR AUD	14.4	2.5	1.0	10.0	8.3	11.5	9.9	9.2	8.3
Morningstar Australia LM GR AUD	14.8	2.4	1.0	10.1	8.5	11.9	10.2	9.5	8.4
S&P/ASX 200 TR AUD	14.8	2.0	0.8	9.4	7.4	10.6	9.3	8.6	8.0
S&P/ASX 200 INDUSTRIAL TR AUD	11.8	6.3	3.2	13.8	11.0	14.1	9.5	8.2	7.9
S&P/ASX 200 Resources TR AUD	23.0	-9.4	-6.0	-2.3	-2.5	1.0	8.6	9.9	7.8
S&P/ASX Small Ordinaries TR AUD	8.4	2.6	1.7	10.1	6.9	7.8	1.4	4.4	6.1
Australian Property									
Morningstar Australia REIT GR AUD	8.3	0.4	-1.0	11.2	5.4	4.0	7.0	4.3	8.4
S&P/ASX 300 A-REIT TR AUD	7.5	6.0	4.8	18.1	12.8	15.1	10.4	6.0	9.6
International Bonds									
Morningstar Gbl Core Bd GR Hdg AUD	-2.2	-1.1	-0.9	1.8	2.1	3.5	-3.4	-0.4	2.1
Morningstar Gbl Core Bd GR AUD	1.3	2.0	0.2	3.2	1.4	6.4	-0.7	0.1	2.7
Morningstar Gbl xAU Core Bd GR Hdg AUD	-2.2	-1.1	-0.9	1.8	2.1	3.5	-3.4	-0.4	2.1
Bloomberg Global Aggregate TR Hdg AUD	-1.2	-1.1	-0.8	1.9	2.3	3.9	-2.8	0.1	2.3
Bloomberg Global Aggregate TR AUD	1.9	2.0	0.2	3.3	1.6	6.8	0.1	0.7	3.1
Bloomberg Global High Yield TR Hdg AUD	8.0	0.8	0.8	4.5	6.7	10.2	0.1	1.9	4.0
International Equity									
Morningstar DM xAU GR Hdg AUD	16.8	6.3	4.7	10.8	11.9	23.4	8.7	—	—
Morningstar DM xAU LM NR Hdg AUD	16.5	6.6	4.7	10.8	12.0	23.8	8.7	10.6	10.0
Morningstar Gbl xAU NR AUD	20.1	9.7	5.8	11.9	10.8	26.6	12.5	12.1	11.7
Morningstar Gbl xAU NR Hdg AUD	14.5	5.7	4.6	9.9	10.8	21.1	6.6	9.3	9.1
MSCI World Ex Australia NR AUD	22.6	10.7	5.9	12.7	11.9	29.8	15.2	13.8	12.7
MSCI World NR AUD	22.4	10.5	5.8	12.7	11.9	29.4	15.1	13.7	12.6
MSCI EM NR AUD	5.1	4.7	6.3	5.7	4.4	12.6	-0.7	3.7	6.3

Stated performance is annualized for periods greater than one year and shown in base currency.

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International Property & Infrastructure									
Morningstar DM REIT NR Hdg AUD	-7.6	-3.9	0.6	3.4	3.2	-0.5	0.0	0.6	4.7
Morningstar Gbl xAU REIT NR Hdg AUD	-8.3	-3.9	0.7	3.3	3.3	-0.5	-0.2	0.4	4.5
Morningstar Gbl Infrastructure Op NR AUD	11.9	3.6	0.5	8.6	9.7	14.9	12.2	5.2	7.8
FTSE EPRA Nareit Dv REITS TR Hdg AUD	-4.2	-3.7	0.1	4.7	2.6	0.3	1.0	0.5	4.9
S&P Global Infrastructure NR Hdg AUD	1.8	-1.9	0.4	1.0	1.4	-0.2	5.8	3.1	5.6
Morningstar Target Allocation Indexes									
Morningstar AUS Con Tgt Alloc NR AUD	2.8	0.4	0.0	2.9	2.8	4.6	0.5	1.4	2.9
Morningstar AUS Mod Tgt Alloc NR AUD	4.8	1.3	0.7	4.5	4.2	7.4	2.1	3.2	4.3
Morningstar AUS Balance Tgt Alloc NR AUD	7.6	2.5	1.5	6.2	5.7	10.3	4.2	5.1	5.9
Morningstar AUS Growth Tgt Alloc NR AUD	10.7	3.4	2.1	7.9	7.1	12.9	6.6	7.0	7.4
Morningstar AUS Agg Tgt Alloc NR AUD	14.0	4.7	2.9	9.6	8.7	16.4	9.0	9.1	8.9
New Zealand Equity									
Morningstar New Zealand GR NZD	10.0	-0.3	-1.2	3.7	1.8	-1.0	-1.1	5.1	9.8
Morningstar Australia NZ 50/50 GR NZD	11.3	0.7	-0.3	6.5	4.1	4.2	4.4	7.6	9.3
S&P/NZX 50 TR NZD	9.6	-0.2	-1.1	3.6	1.6	-1.3	-1.3	4.7	8.9
S&P/NZX All TR NZD	9.2	-0.4	-1.2	3.6	1.5	-1.3	-1.4	4.8	9.1
S&P/NZX Mid Cap TR NZD	1.3	1.1	-0.1	5.9	0.4	-4.8	-3.1	3.0	9.8
S&P/NZX Small Cap TR NZD	1.9	-3.8	-4.0	2.3	1.2	1.5	-0.9	6.9	8.9

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