

The go-to guide for the latest super, MySuper and pension results

# Fund Crediting Rate Survey

The monthly SuperRatings Fund Crediting Rate Survey (FCRS) is the industry standard guide for the latest results for 1800+ super, MySuper and pension investment options.

FCRS sets the benchmark for currency, comprehensiveness and credibility. It is the survey of choice for funds wishing to benchmark their performance.

Each survey publishes returns for over 1800 options offered across the Industry, Retail, Public and Corporate sectors.

All major option types are ranked, with median returns calculated for periods from 1 month to 10 years, allowing benchmarking flexibility over many time periods. For convenience, you can also customise surveys to your specific needs, using such variables as growth asset ratio and option type.

All results can be printed as a PDF and exported to Excel.

Launched in June 2003, the SuperRatings FCRS is now used by over 80% of Australia's major superannuation funds as the 'go-to' guide and is widely referenced by the media every month.

FCRS provides transparency through the identification of actual returns to members, rather than the traditional surveys which have focused on underlying investment manager returns, figures which generally have little relevance to members.

In addition we also publish SR 50/25 indices to provide a better representation and consistency of return medians, ensuring that small funds (with few members) do not have an impact on the median result. Indexes are calculated based on a selected universe whose asset sizes represent the largest investment options.

It works similarly to major share indices and provides a consistent measurement for super funds and consumers. Many of Australia's largest funds now use the SuperRatings' medians and quartiles when reporting both internally and externally.

An FCRS subscription package includes:

- Five surveys emailed directly to you each month including superannuation, pension and sustainable investments, along with a CPI+ Objectives and a Risk Report.
- Traditional performance surveys grouped by option type as well as performance against investment objectives.
- Access to published returns of over 1,000 super and 800 pension investment options.
- Customisation function – create your own peer groups, medians and benchmarks.
- Risk and volatility measures.
- Access to historical surveys dating back to October 2006.

## Want to find out more?

For more information on the SuperRatings® Fund Crediting Rate Survey, get in touch with us on **1300 826 395** or **info@superratings.com.au**

**superratings.com.au**

**About SuperRatings** SuperRatings Pty Ltd ABN: 95 100 192 283 AFSL 311880 (SuperRatings) is a superannuation research house with specialist areas of expertise, that was originally established in 2002. From 1 July 2011, SuperRatings became a fully owned subsidiary of the entity currently registered as Lonsec Holdings Pty Ltd ABN: 41 151 235 406, a privately owned and independent entity with a multi-brand strategy of providing leading financial services research and investment execution. SuperRatings believes that professional financial advisers need informed opinions on the best superannuation and pension financial products to provide real value for their clients. To meet this need, SuperRatings has in place an experienced research team, which draws on a robust research process to undertake in-depth assessment of superannuation financial products. No fee is paid by superannuation and pension funds to SuperRatings for reviewing and rating superannuation and pension financial products. Warnings: Past performance is not a reliable indicator of future performance. Any express or implied rating or advice presented in this document is limited to "General Advice" (as defined in the Corporations Act 2001(Cth)) and based solely on consideration of the merits of the superannuation financial product(s) alone, without taking into account the objectives, financial situation and particular needs ('financial circumstances') of any particular person. Before making an investment decision based on the rating(s) or advice, the reader must consider whether it is personally appropriate in light of his or her financial circumstances, or should seek independent financial advice on its appropriateness. If SuperRatings' advice relates to the acquisition or possible acquisition of particular financial product(s), the reader should obtain and consider the Product Disclosure Statement for each superannuation financial product before making any decision about whether to acquire a financial product. SuperRatings research process relies upon the participation of the superannuation fund or product issuer(s). Should the superannuation fund or product issuer(s) no longer be an active participant in SuperRatings' research process, SuperRatings reserves the right to withdraw the rating and document at any time and discontinue future coverage of the superannuation and pension financial product(s).