February 2022

New research conducted by the University of Adelaide

## Understanding self-managed super fund performance

For the latest SMSF research and information, visit smsfassociation.com.

On average, the investment performance of SMSFs with balances of \$200,000 or more (which are not heavily invested in cash) was competitive with APRA regulated funds during the period in question.

The findings complement research released by Rice Warner in 2020 which found SMSFs with balances of **\$200,000 or more, are cost competitive with both Industry and Retail funds.** 

## SMSFs with **\$200,000**

or more in net assets, can be competitive with APRA regulated funds both in terms of cost and investment performance.

The research provides tangible evidence of the benefits of diversification. On aggregate, SMSFs with more diversified asset allocations achieved higher returns.

SMSFs generate greater variation in returns relative to APRA funds, highlighting the role for professional advice and a sound investment strategy.

SMSFassoc 🛛 🞯 smsfassociation 🖉 🍞 SMSFassoc 🛛 in smsf-association 🔹 smsfassociation.com

The information provided in this factsheet has been taken from the University of Adelaide research report 'Understanding self managed super fund performance'. It does not take into account the personal objectives, financial situation or particular needs of any reader and should not therefore be relied upon to make financial decisions. Understanding self managed superfund performance is only one of the factors that needs to be considered when deciding whether an SMSF is right for you.

