

Key Investment Indices

As at August 2026

Atchison

	1 Month (%)	3 Months (%)	6 Months (%)	1 Year (%pa)	3 Years (%pa)	5 Years (%pa)	8 Years (%pa)	10 Years (%pa)
	Return (Cumulative)			Return (Annualised)				
Australian Equities								
ASX 20	-0.6	3.9	1.2	8.3	12.5	8.9	9.4	9.9
ASX 50	0.5	4.5	0.8	5.1	11.1	8.1	8.6	9.2
ASX Small Cap	5.6	3.6	-0.2	4.7	11.6	5.9	8.4	9.1
ASX Mid Cap 50	5.8	7.8	1.1	2.1	10.3	7.1	8.8	9.8
ASX 200	1.5	4.5	0.2	4.3	11.1	7.7	8.5	9.2
ASX 300	1.6	4.4	-0.7	3.4	10.8	7.4	8.4	9.2
ASX Small Ords	5.1	-1.0	-7.3	-2.2	8.7	1.5	4.5	5.9
ASX 200 - A-REIT	-6.6	-5.1	-5.8	-15.5	6.6	2.6	4.7	4.4
ASX 200 - Financials	-5.4	1.8	-5.0	-0.9	17.4	11.1	9.2	9.1
ASX 200 - Financials ex-A-REIT	-5.5	1.8	-5.0	-1.2	17.5	11.2	9.3	9.2
ASX Tech	7.1	12.2	9.6	-26.8	7.0	0.1		
ASX 200 Resources	11.6	3.9	5.8	45.0	15.6	15.0	14.0	15.9
Australia Ex-Financials and Resources	1.2	8.8	2.1	-9.1				
Global Equities								
World Ex-Australia	0.5	2.7	9.4	10.0	16.3	11.8	12.9	13.7
World Ex-Australia (Hedged)	2.5	2.7	10.3	20.9	19.4	10.9	11.9	12.7
Global Top 100 Companies	-0.1	1.6	12.9	15.6	20.4	15.9	16.3	16.8
Global Value	3.0	7.9	29.1	50.4	26.3	18.3		
Global Quality	-0.1	2.3	5.3	8.5	13.7	10.4	13.9	14.9
Global Mid-Caps	-1.9	1.6	5.2	6.8	10.1	8.2	9.4	11.1
Global Small-Caps	0.7	2.5	3.8	9.8	12.7	7.2		
Asia Ex-Japan	1.4	-1.0	8.3	25.9	19.1	8.5	9.0	9.9
Emerging Markets	1.4	-0.8	7.3	26.5	18.5	7.9	8.0	8.9
US Top 500	0.7	2.0	11.7	9.7	16.8	13.0	14.6	15.7
US Top 500 (Hedged)	2.7	1.7	11.5	19.0	19.3	10.6	12.3	13.4
Europe	-0.7	4.5	2.4	9.8	13.5	9.6	9.3	9.9
Japan	1.2	4.4	3.6	17.4	15.3	9.9	8.6	9.4
China Top 50	-3.6	2.8	-4.5	-13.2	8.2	-0.2	0.0	2.3
Real Assets								
Australian Property	-5.9	0.4	-5.6	-12.1	7.6	2.9	5.4	5.4
Global Property (Hedged)	-3.0	1.9	1.4	11.5	8.6	0.0		
Global Infrastructure	-3.4	0.6	-3.8	2.7	8.9	6.4		
Fixed Interest (Domestic)								
Cash	0.4	1.2	2.2	4.1	4.3	3.3	2.4	
Australian Composite Bond	-0.2	0.3	0.5	0.5	3.2	-0.2	1.5	1.4
Australian Treasury Bond	-0.4	0.0	0.2	-0.2	2.5	-1.0	1.1	1.0
Australian Semi-Government Bond	-0.2	0.5	0.7	0.1	3.3	0.5	1.7	1.7
Australian Corporate Bond	-0.1	0.8	1.2	1.7	4.7	1.6		
Fixed Interest (Global)								
Global Aggregate Bond	0.1	-0.4	-1.7	1.3	3.2	-1.1	0.9	
Global Treasury Bond	0.1	-0.3	-1.8	1.3				
Global Corporate Bond	0.4	-0.5	-1.1	2.2	4.5	-0.6	1.7	1.5
Global High-Yield Bond	0.9	1.2	1.7	4.6	7.3	3.0	3.6	4.0
Multi Asset								
Conservative	0.5	0.8	-0.9	2.1	6.0	2.2	3.3	
Balanced	0.7	1.4	2.2	5.9	8.9	4.3	5.3	
Growth	1.0	2.1	2.1	6.3	10.7	6.1	7.0	
High Growth	1.2	2.8	3.8	8.6	13.2	8.2	9.4	
AUD against								
US Dollar	-2.0	0.4	-0.6	-8.7	-3.3	0.4	0.1	0.5
Yen	-2.3	0.1	-2.8	-16.0	-6.3	-6.8	-4.4	-3.8
Euro	-1.1	-0.1	-2.2	-9.4	-1.1	0.1	0.1	0.9
Pound Sterling	-1.3	1.0	0.3	-8.4	-1.1	0.1	0.6	0.8
Chinese Renminbi	-1.6	1.1	1.5	-3.1	-0.7	-0.4	0.3	0.4
Resources								
Gold	7.5	-2.5	-16.0	17.3	26.7	19.5	17.3	13.0
Silver	13.7	-11.0	-25.9	57.5	34.6	22.7	20.5	13.6
Oil	2.9	2.9	55.3	68.0	18.0	18.9	-1.8	2.0
Uranium	13.7	-9.2	-15.9	7.2	24.7			
Global Sectors and Themes								
Global Healthcare	3.6	10.6	2.6	19.2	6.9	4.3	7.2	8.3
Biotech	8.3	19.3	26.8	65.2	22.6	4.4		
Semiconductors	0.3	-7.5	42.3	109.3	51.3	33.6		
Global Consumer Staples	-3.2	2.7	-6.6	-3.0	3.2	4.4	6.2	6.0
Green Metal Miners	10.2	-6.0	-10.3	42.5	18.2			
Global Technology	6.0	10.2	46.7	18.8	16.5	9.9	14.8	
Battery Tech & Lithium	2.8	-19.1	-5.2	34.4	16.6	11.8	17.5	
Global Defence	0.7	-3.8	-9.6	-0.4				
E-Sports and Gaming	5.3	13.9	3.4	-20.9	18.2			
Global Robotics and Artificial Intelligence	-0.8	-9.8	-8.2	-1.8	7.0	0.3		
Global Royalties	8.6	-0.5	0.4	19.4	19.8			
Digital Assets								
Bitcoin	22.1	7.6	17.2	-34.4	36.5			
Ethereum	29.0	23.5	24.8	-48.0	8.3			