



Nest Retirement Date Fund performance

This table shows the performance of all Nest funds from the past 1, 3, 5 and 10 years as well as their performance since launch

March 2024

Nest Fund	1 year	3 years	5 years	10 years	As at 31/03/2024 Since launch**
2023	9.5	2.6	3.6	5.6	6.1
2024	9.7	2.9	4.1	6.1	6.5
2025	10.2	3.3	4.6	6.6	6.9
2026	10.8	3.6	5.0	7.0	7.2
2027	11.5	4.0	5.5	7.3	7.5
2028	12.1	4.4	6.0	7.6	7.7
2029	12.7	4.8	6.4	7.8	7.9
2030	13.1	5.1	6.8	8.0	8.0
2031	13.4	5.4	7.1	8.2	8.1
2032	13.8	5.6	7.2	8.2	8.2
2033	14.1	5.7	7.3	8.3	8.2
2034	14.3	5.7	7.3	8.3	8.2
2035	14.3	5.7	7.3	8.3	8.2
2036	14.3	5.7	7.3	8.3	8.2
2037	14.3	5.7	7.3	8.3	8.2
2038	14.3	5.7	7.3	8.3	8.2
2039	14.3	5.7	7.3	8.3	8.2
2040	14.3	5.7	7.3	8.3	8.2
2041	14.3	5.7	7.3	8.3	8.2
2042	14.3	5.7	7.3	8.3	8.2
2043	14.3	5.7	7.3	8.3	8.2
2044	14.3	5.7	7.3	8.3	8.2
2045	14.3	5.7	7.3	8.3	8.2
2046	14.3	5.7	7.3	8.3	8.2
2047	14.3	5.7	7.3	8.3	8.2
2048	14.3	5.7	7.3	8.3	8.3
2049	14.3	5.7	7.3	8.3	8.3
2050	14.3	5.7	7.3	8.3	8.2
2051	14.3	5.7	7.3	8.3	8.2
2052	14.3	5.7	7.3	8.2	8.1
2053	14.3	5.7	7.3	8.0	8.0
2054	14.3	5.7	7.3	7.8	7.8
2055	14.3	5.7	7.3	7.6	7.6
2056	14.3	5.7	7.3	7.4	7.5
2057	14.3	5.7	7.3	7.3	7.4
2058	14.3	5.7	7.4	7.3	7.5
2059	14.3	5.7	7.1	7.2	7.4
2060	14.3	5.7	7.0	7.1	6.9
2061	14.3	5.4	6.5	-	6.5
2062	14.2	5.2	6.1	-	6.8
2063	14.1	4.8	5.9	-	5.5
2064	13.3	4.6	5.8	-	5.3
2065	13.1	4.6	5.7	-	6.4

Nest Fund	1 year	3 years	5 years	10 years	As at 31/03/2024 Since launch**
2066	13.1	4.6	-	-	5.3
2067	13.1	4.6	-	-	4.5
2068	13.1	-	-	-	2.5
2069	13.1	-	-	-	12.3
2070	-	-	-	-	4.9
Starter Fund***	12.9	4.5	5.7	6.5	6.8
Nest Ethical Foundation Fund	8.5	2.3	4.9	7.2	7.4
Nest Ethical Growth Fund	10.7	4.1	7.3	9.1	9.1
Nest Ethical Consolidation Fund	8.2	-0.5	2.4	3.6	2.9
Nest Higher Risk Fund	15.0	5.8	7.8	9.2	9.3
Nest Sharia Fund	32.1	14.7	17.2	15.5	14.5
Nest Lower Growth Fund	6.2	1.3	1.4	0.9	0.8
Nest Post Retirement Date Fund One****	5.6	1.8	1.4	1.0	0.9
Nest Post Retirement Date Fund Two*****	9.4	-	-	-	5.7
Nest Guided Retirement Fund *****: Nest Vault - Money for the future	11.6	3.5	-	-	6.7
Nest Guided Retirement Fund *****: Nest Vault - Money for later life	7.9	-1.3	-	-	-0.8
Nest Guided Retirement Fund *****: Nest Wallet	4.9	2.2	-	-	1.6
Nest Guided Retirement Fund *****: Nest Safe	4.9	1.8	-	-	1.4
UK CPI	3.2	6.7	4.5	2.9	2.9
UK CPI + 3%	6.3	9.9	7.6	6.0	5.9

* Figures in this table are annualised total return net of Nest annual management charge

** Launch date for most Nest Funds is August 2011. The Nest 2058 Retirement Fund launched in January 2012. Each subsequent fund was launched the following January. So the Nest 2059 Retirement Fund Fund was launched in January 2013 and so on. Nest Guided Retirement Fund launched in 2020.

*** Nest makes this fund available to members joining before they're eligible for auto enrolment.

**** This fund aims to manage conversion risk associated with withdrawing all or some of the pot as cash and is available for members who leave their money with Nest after their Nest Retirement Date Fund matured before 2022. For members with pots below £10,000 when their Nest Retirement Date Fund matures who don't take any other action, we will automatically move their pot into this fund. This fund is now closed to new members and only holds members' pot's which were in the Nest Retirement Date Funds that had matured before 2022.

***** This fund aims to manage conversion risk associated with withdrawing all or some of the pot as cash and is available for members who leave their money with Nest after their Nest Retirement Date Fund matures. For members with pots below £10,000 when their Nest Retirement Date Fund matures who don't take any other action, we will automatically move their pot into this fund.

***** This fund aims to manage members' money appropriately throughout their retirement and is available for members to join if they are aged between 60 and 70 and have more than £10,000 in their pot. For members with pots above £10,000 when their Nest Retirement Date Fund matures who don't take any other action, we will automatically move their pot into this fund.



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