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

September 2024

Nest Fund	1 year	3 years	5 years	10 years	As at 30/09/2024 Since launch**
2024	12.5	3.0	3.9	5.9	6.6
2025	13.0	3.2	4.4	6.4	6.9
2026	13.6	3.5	4.8	6.8	7.2
2027	14.2	3.8	5.2	7.2	7.5
2028	14.8	4.1	5.7	7.4	7.7
2029	15.3	4.4	6.1	7.7	7.9
2030	15.5	4.6	6.5	7.9	8.1
2031	15.7	4.7	6.8	8.1	8.2
2032	15.8	4.9	6.9	8.1	8.2
2033	16.0	5.0	7.0	8.1	8.3
2034	16.1	5.0	7.0	8.2	8.3
2035	16.1	5.1	7.0	8.2	8.3
2036	16.2	5.1	7.0	8.2	8.3
2037	16.1	5.1	7.0	8.2	8.3
2038	16.1	5.1	7.0	8.2	8.3
2039	16.1	5.1	7.0	8.2	8.3
2040	16.1	5.1	7.0	8.2	8.3
2041	16.1	5.1	7.0	8.2	8.3
2042	16.1	5.1	7.0	8.2	8.3
2043	16.1	5.1	7.0	8.2	8.3
2044	16.1	5.1	7.0	8.2	8.3
2045	16.1	5.1	7.0	8.2	8.3
2046	16.1	5.1	7.0	8.2	8.3
2047	16.1	5.1	7.0	8.2	8.3
2048	16.1	5.1	7.0	8.2	8.3
2049	16.1	5.1	7.0	8.2	8.3
2050	16.1	5.1	7.0	8.2	8.3
2051	16.1	5.1	7.0	8.2	8.3
2052	16.1	5.1	7.0	8.1	8.2
2053	16.1	5.1	7.0	8.0	8.0
2054	16.1	5.1	7.0	7.8	7.8
2055	16.1	5.1	7.0	7.6	7.7
2056	16.1	5.1	7.0	7.5	7.6
2057	16.1	5.1	7.0	7.3	7.5
2058	16.1	5.1	7.2	7.4	7.6
2059	16.1	5.1	6.9	7.2	7.5
2060	16.1	5.1	6.9	7.1	7.0
2061	16.1	5.1	6.4	-	6.6
2062	16.0	5.0	6.0	-	6.9
2063	15.8	4.6	5.7	-	5.7
2064	15.6	4.4	5.6	-	5.6
2065	15.6	4.4	5.6	-	6.6
2066	15.6	4.4	-	-	5.7

Nest Fund	1 year	3 years	5 years	10 years	As at 30/09/2024 Since launch**
2067	15.6	4.4	-	-	5.1
2068	15.6	-	-	-	3.7
2069	15.5	-	-	-	11.4
2070	-	-	-	-	9.6
Starter Fund* **	15.4	4.3	5.6	6.5	6.8
Nest Ethical Foundation Fund	12.3	0.8	3.9	6.9	7.3
Nest Ethical Growth Fund	14.8	1.6	5.9	8.8	8.9
Nest Ethical Consolidation Fund	11.5	-0.7	1.6	3.4	3.0
Nest Higher Risk Fund	17.7	5.1	7.5	9.1	9.3
Nest Sharia Fund	26.7	12.1	15.7	15.2	14.4
Nest Lower Growth Fund	7.6	2.3	1.8	1.2	1.0
Nest Post Retirement Date Fund One** **	6.7	2.8	1.9	1.3	1.2
Nest Post Retirement Date Fund Two*** **	12.5	-	-	-	6.2
Nest Guided Retirement Fund ****: Nest Vault - Money for the future**	14.2	3.1	-	-	6.9
Nest Guided Retirement Fund****: Nest Vault - Money for later life**	11.5	-0.9	-	-	-0.1
Nest Guided Retirement Fund****: Nest Wallet**	5.2	3.1	-	-	2.0
Nest Guided Retirement Fund ****: Nest Safe**	5.2	2.6	-	-	1.8
UK CPI	1.7	6.1	4.3	3.0	2.8
UK CPI + 3%	4.7	9.3	7.4	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 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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