



Self-managed super fund quarterly statistical report – June 2016

A statistical report for the self-managed super fund market for the period up to June 2016.

Last updated 15 September 2016

We publish quarterly statistical reports for the self-managed super fund (SMSF) market. The contents of this report have been worked out following valuable feedback from the superannuation industry.

The information in this report includes:

- SMSF population and asset allocation tables
 - [population of SMSFs and members](#)
 - [asset allocation \(break-up of assets into various classes\)](#)
- Annual SMSF population analysis tables
 - [asset allocation by asset value of the fund](#)
 - [membership sizes \(SMSFs with one, two, three or four members\)](#)
 - [demographics \(state break-up of SMSFs, members and assets\)](#)
 - [member demographics \(age and income of members\)](#)
 - [total asset ranges \(distribution of SMSFs by the asset size of SMSFs and the assets held\)](#)
 - [average and median assets \(per member and per SMSF\)](#)
 - [flow of funds \(contributions, transfers, benefits and expenses\)](#)

- SMSF quarterly establishment tables
 - [demographics \(state break up of SMSFs\)](#)
 - [member demographics \(age of new members\)](#)
 - [member demographics \(income range of new members\)](#)
- A number of tables no longer report historical data from before 2011
 - to view all data from before 2011, refer to [historical data](#).

Note: Most of the information in this report is estimated. Caution should be taken when using or presenting this data. The estimates have been based on the data provided by SMSFs reporting their financial position as at 30 June of the relevant financial year.

The SMSF population, asset allocation and establishment tables are updated on a quarterly basis. The next report will cover the period up to 30 September 2016 and should be available in November 2016. The remainder of the tables are updated annually when the June quarter updates are published.

If you would like to provide comments, or you have questions about this report, email us at SPR_smsfstats@ato.gov.au

This email address is only for comments and questions about published SMSF data.

Statistics explanatory notes



Data provided by SMSFs reporting their financial position as at 30 June of the relevant financial year.

Population and asset allocation tables



Details of the population growth and asset allocation of SMSFs.

Annual SMSF population analysis tables



Contain demographic information of SMSFs, as well as individual

June 2016 quarter establishment tables



Funds established between 1 April 2016 and 30 June 2016.

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Statistics explanatory notes

Data provided by SMSFs reporting their financial position as at 30 June of the relevant financial year.

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[Additional information](#)

[Historical data](#)

Much of the information in the statistical tables is estimated, based on data reported to us. Caution should be taken when using or presenting this data. The estimates have been based on data provided by SMSFs reporting their financial position as at 30 June of the relevant financial year.

Rounding of figures may cause minor discrepancies to totals.

The SMSF population, asset allocation and establishment tables are updated on a quarterly basis, with the remainder of the tables updated annually when the June quarter updates are published.

Quarterly reports (as at the end of March, June, September and December each year) will generally be published within two months after the end of the quarter.

Additional information

From the June 2016 report, the 2014–15 annual return data has been incorporated into our estimation model – as a result, the estimates are

a more accurate reflection of SMSF asset holdings.

From the 2012–13 year, new data is being collected on the SMSF annual return, relating to non-deductible expense items and assets held under limited recourse borrowing arrangements (LRBA). These changes to reporting have resulted in adjustments to our estimates as new data is incorporated into the statistics in each June quarter report.

In the September 2015 quarterly report, the methodology used to estimate LRBA assets was improved by applying property indices returns to stimulate growth between the June quarters. This change has been applied from the September 2012 quarter onwards, to reflect the data used in our estimates from the specific LRBA label introduced in the 2012 SMSF annual return.

In addition, the following improvements were also made from the June 2016 report – the:

- member demographic tables now report additional age ranges. The '45–54' age range has been split into two age ranges, '45–49' and '50–54'. The '55–64' age range has been split into two age ranges, '55–59' and '60–64'. The '65–74' age range has been split into two age ranges, '65–69' and '70–74'. The '>74' age range has been split into two age ranges, '75–84' and '85+'. The change in age ranges is to align with the age ranges used by APRA for comparability.
- a new table added under the 'total asset range table' with statistics on the proportion (%) of assets held by funds in each asset range. The existing table provides the proportion of funds that hold total assets within the specified ranges.

On 16 December 2015, we released *Self-managed superannuation funds: A statistical overview 2013–14*. Because the overview is based on historical data, it will differ from the more recent data in this quarterly SMSF statistical report.

See also:

- Self-managed super fund quarterly statistics methodology
- Self-managed superannuation funds – a statistical overview 2013–2014

Historical data

A number of tables no longer report historical data from before 2011.
To view all data from before 2011, refer to:

- Self-managed super fund statistical report – June 2012
- Self-managed super fund statistical report – June 2013
- Self-managed super fund statistical report – June 2014
- Self-managed super fund statistical report – June 2015

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Population and asset allocation tables

Details of the population growth and asset allocation of SMSFs.

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[SMSF population table – annual data](#)

[Population table – quarterly data](#)

[Asset allocation tables \(\\$m\)](#)

The following tables contain details of the population growth and asset allocation of SMSFs. They include details of the number of SMSFs established or wound up during recent financial years (quarterly and annual data) and estimates of the amount of assets held by SMSFs for each type of asset. These tables are updated on a quarterly basis.

SMSF population table – annual data

This table contains details of the number of SMSFs that were established or wound up during each financial year. Establishment date is the date when an SMSF is deemed by the super law to come into

existence, and can be different from the date the SMSF registers with us.

Wind-ups include both those initiated by trustees and those as a result of ATO compliance and cleansing activity. Those initiated by the trustees refer to the year the fund actually winds up, rather than the date this advice is received by us. Net establishments are calculated as establishments, **less** wind-ups.

Total number of SMSFs is calculated as the number of SMSFs as at the end of the previous financial year, **plus** net establishments for the financial year.

The number of members of SMSFs is estimated based on SMSF return form data, with the estimates for June 2016 extrapolated from 2014–15 data.

The data was extracted on 12 July 2016.

Population table – annual data

	Establishments	Windups	Net establishments	Total members
Jun-11	33,218	7,250	25,968	4
Jun-12	41,080	7,766	33,314	4
Jun-13	39,620	10,873	28,747	
Jun-14	33,813	11,903	21,910	!
Jun-15	34,372	11,136	23,236	

Jun-16	31,351	1,416	29,935	
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Population table – quarterly data

This table is similar to the [SMSF population table – annual data](#).

However, it contains details of the number of SMSFs that established or wound up in each quarter since the June 2011 quarter.

Quarterly establishments and wind-ups for recent quarters may be understated, because there is often a time lag between when this event occurs and when we receive notification from the SMSF. In addition, recent quarter estimates of the total members of SMSFs are extrapolated from 2014–15 return form data.

The data was extracted on 12 July 2016.

Population table – quarterly data

	Establishments	Wind-ups	Net establishments	Total number of SMSFs
Jun-11	9,610	5,190	4,420	44,000
Sep-11	10,595	1,041	9,554	44,954
Dec-11	8,924	524	8,400	45,800
Mar-12	9,881	667	9,214	46,714
Jun-	11,680	5,534	6,146	47,860

12				
Sep-12	11,549	2,031	9,518	48%
Dec-12	9,909	775	9,134	49%
Mar-13	8,606	884	7,722	49%
Jun-13	9,556	7,183	2,373	50%
Sep-13	9,341	1,571	7,770	50%
Dec-13	7,958	796	7,162	51%
Mar-14	7,886	1,073	6,813	52%
Jun-14	8,628	8,463	165	52%
Sep-14	9,561	919	8,642	53%
Dec-14	8,034	933	7,101	53%
Mar-15	8,046	1,094	6,952	54%
Jun-15	8,731	8,190	541	54%

Sep-15	9,669	281	9,388	556
Dec-15	7,134	356	6,778	563
Mar-16	7,566	344	7,222	570
Jun-16	6,982	435	6,547	571

Asset allocation tables (\$m)

These tables contain estimates of the amount of assets held by SMSFs for each type of asset listed on the SMSF annual return. Tables also contain estimates of borrowings, other liabilities and total net Australian and overseas assets held by SMSFs.

The figures for June 2011 through to June 2015 are estimates based on return form data for those financial years, with estimates for June 2016 and recent quarters extrapolated from 2014–15 return form data. Each quarter, these estimates are updated as more return data becomes available. The estimates have been based on data provided by SMSFs reporting their financial position as at 30 June of the relevant financial year.

The following estimates relate to the total SMSF population, including funds established in the most recent quarter. This means that any changes in asset allocation figures from one quarter to another will be based on estimates for funds established in that quarter as well as estimates for all other SMSFs.

Changes were made to the 2012–13 SMSF annual return to improve reporting on assets held under limited recourse borrowing arrangements. This has resulted in better data collection and more accurate estimates for June 2013 and subsequent quarters that have been revised to incorporate actual data from 2013, 2014 and 2015 returns.

These estimates relate to the total SMSF population. The data was extracted on 12 July 2016.

Asset allocation tables (\$m)

	Listed trusts (\$m)	Unlisted trusts (\$m)	Insurance policy (\$m)	Other managed investments (\$m)
Jun-11	16,462	37,126	162	19,267
Sep-11	15,519	34,999	158	18,285
Dec-11	15,806	35,646	160	18,770
Mar-12	16,762	37,803	167	20,219
Jun-12	14,395	37,705	171	18,015
Sep-12	15,086	39,514	177	19,036
Dec-12	15,883	41,602	178	19,902
Mar-13	16,742	43,853	183	21,054
Jun-13	16,864	42,719	183	21,352

Sep-13	17,982	45,551	190	22,872
Dec-13	18,733	47,453	194	23,915
Mar-14	19,197	48,626	196	24,974
Jun-14	20,570	49,194	167	25,183
Sep-14	20,703	49,512	168	25,593
Dec-14	21,340	51,038	172	26,623
Mar-15	22,771	54,458	181	28,382
Jun-15	25,781	56,904	159	30,693
Sep-15	25,288	55,816	155	30,725
Dec-15	26,249	57,938	158	31,754
Mar-16	26,051	57,500	155	31,526
Jun-16	26,843	59,248	156	31,658

Asset allocation tables (\$m) continued

	Listed shares (\$m)	Unlisted shares (\$m)	Limited recourse borrowing arrangements (\$m)	Non- residential real property (\$m)
Jun- 11	124,765	4,722	1,397	47,434
Sep- 11	110,683	4,764	1,422	47,355
Dec- 11	113,621	4,790	1,451	47,847
Mar- 12	124,185	4,838	1,487	49,189
Jun- 12	117,249	5,163	2,523	53,271
Sep- 12	127,408	5,226	2,546	53,767
Dec- 12	136,337	5,240	2,637	55,681
Mar- 13	147,915	5,278	2,698	56,977
Jun- 13	141,036	5,297	8,865	57,077
Sep- 13	154,926	5,340	9,167	59,022

Dec-13	159,965	5,372	9,635	62,033
Mar-14	163,416	5,407	9,904	63,762
Jun-14	167,575	5,634	15,572	61,098
Sep-14	166,062	5,644	15,914	62,440
Dec-14	170,991	5,646	16,422	64,435
Mar-15	188,815	5,662	16,911	66,354
Jun-15	186,788	6,176	20,364	63,846
Sep-15	173,958	6,187	20,984	65,790
Dec-15	184,941	6,199	21,255	66,638
Mar-16	179,944	6,191	21,508	67,431
Jun-16	187,790	6,217	21,877	68,590

Asset allocation tables (\$m) continued

	Overseas shares (\$m)	Overseas non- residential real property (\$m)	Overseas residential real property (\$m)	Overseas managed investmen (\$m)
Jun-11	1,359	85	142	5
Sep-11	1,206	75	126	2
Dec-11	1,238	77	129	2
Mar-12	1,353	84	141	1
Jun-12	1,466	95	172	2
Sep-12	1,593	103	187	3
Dec-12	1,704	110	200	3
Mar-13	1,849	119	217	3
Jun-13	1,969	107	207	3
Sep-13	2,163	118	227	4

Dec-13	2,233	121	235	4
Mar-14	2,282	124	240	4
Jun-14	1,852	115	231	4
Sep-14	1,836	114	229	4
Dec-14	1,890	117	235	5
Mar-15	2,087	129	260	5
Jun-15	3,287	109	221	6
Sep-15	3,062	102	206	6
Dec-15	3,255	108	219	6
Mar-16	3,167	105	213	6
Jun-16	3,305	110	223	7

Asset allocation tables (\$m) continued

	Total Australian and overseas assets (\$m)	Borrowings (\$m)	Other Liabilities (\$m)	Total net Australia and overseas assets (\$m)
Jun-11	402,094	4,732	3,483	393,87
Sep-11	385,754	4,540	3,341	377,87
Dec-11	393,446	4,630	3,408	385,40
Mar-12	413,807	4,870	3,584	405,35
Jun-12	422,401	6,701	3,659	412,04
Sep-12	438,974	6,963	3,802	428,20
Dec-12	456,412	7,240	3,953	445,21
Mar-13	476,818	7,564	4,130	465,12
Jun-13	480,292	9,829	3,972	466,49
Sep-13	504,241	10,319	4,171	489,75

Dec-13	518,968	10,621	4,292	504,05
Mar-14	529,520	10,837	4,380	514,30
Jun-14	541,604	13,768	4,658	523,17
Sep-14	543,920	13,826	4,678	525,41
Dec-14	556,448	14,145	4,785	537,51
Mar-15	585,954	14,895	5,039	566,02
Jun-15	603,401	16,853	5,113	581,43
Sep-15	592,709	16,554	5,022	571,13
Dec-15	610,732	17,058	5,175	588,49
Mar-16	607,131	16,957	5,144	585,03
Jun-16	621,703	17,364	5,268	599,07

Annual SMSF population analysis tables

Contain demographic information of SMSFs, as well as individual members, as at 30 June 2016.

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Asset allocation by asset value of the fund table

Demographic table

Member demographic table – age ranges

Member demographic table – income ranges

Total asset range tables

Average and median assets table (\$)

Flow of funds table (\$m)

The following tables contain demographic information of SMSFs, as well as individual members, as at 30 June 2016. They also include a more detailed analysis of asset allocation of SMSFs, as well as estimates of the total amount of 'flows' into and out of SMSFs. These tables are updated on an annual basis, when the June quarter updates are published.

Asset allocation by asset value of the fund table

This table contains the approximate distribution of assets held by SMSFs of different sizes, based on total fund assets. These tables are based on actual return data for the 2011 through to 2015 financial years.

The data is provided by SMSFs reporting their financial position as at 30 June of the relevant financial year.

The data was extracted on 12 July 2016.

Asset value ranges of funds – 2011

	\$1– \$50k	>\$50– \$100k	>\$100– \$200k	>\$200– \$500k
Listed trusts	1.90%	2.82%	3.92%	4.63%
Unlisted trusts	2.50%	4.33%	6.00%	7.06%
Insurance policy	0.06%	0.10%	0.06%	0.05%
Other managed investments	2.19%	3.21%	4.32%	5.05%
Cash and term deposits	54.47%	46.69%	40.53%	33.02%
Debt securities	0.17%	0.24%	0.28%	0.41%
Loans	2.36%	2.27%	1.51%	0.81%
Listed shares	22.95%	27.33%	29.54%	30.60%
Unlisted shares	1.92%	2.18%	1.71%	1.07%
Derivatives and instalment warrants	0.17%	0.27%	0.44%	0.55%

Non residential real property	0.69%	1.83%	3.84%	7.70%
Residential real property	0.39%	0.87%	1.81%	4.59%
Artwork, collectibles, metal or jewels	1.04%	1.00%	0.71%	0.33%
Other assets	8.09%	5.65%	4.36%	3.30%
Overseas shares	0.37%	0.35%	0.30%	0.26%
Overseas non-residential real property	0.06%	0.06%	0.04%	0.03%
Overseas residential real property	0.12%	0.16%	0.12%	0.07%
Overseas managed investments	0.07%	0.06%	0.07%	0.06%
Other overseas assets	0.48%	0.58%	0.45%	0.40%
Total	100.00%	100.00%	100.00%	100.00%

Asset value ranges of funds – 2012

	\$1– \$50k	>\$50– \$100k	>\$100– \$200k	>\$200– \$500k
Listed trusts	1.79%	2.41%	3.21%	3.78%
Unlisted trusts	2.45%	4.01%	5.67%	6.60%
Insurance policy	0.05%	0.07%	0.04%	0.03%
Other managed investments	1.95%	2.69%	3.72%	4.38%
Cash and term deposits	54.82%	49.62%	45.35%	37.15%
Debt securities	0.15%	0.21%	0.32%	0.55%
Loans	2.11%	2.09%	1.47%	0.81%
Listed shares	22.45%	25.29%	26.56%	27.46%
Unlisted shares	1.90%	2.21%	1.71%	1.12%
Limited recourse borrowing arrangements	0.05%	0.17%	0.36%	0.88%

Non residential real property	0.68%	1.74%	3.64%	8.12%
Residential real property	0.45%	1.00%	1.81%	4.85%
Collectables and personal use assets	0.71%	0.66%	0.48%	0.22%
Other assets	9.40%	6.53%	4.66%	3.26%
Overseas shares	0.39%	0.37%	0.34%	0.28%
Overseas non-residential real property	0.06%	0.07%	0.04%	0.03%
Overseas residential real property	0.12%	0.23%	0.14%	0.09%
Overseas managed investments	0.05%	0.07%	0.05%	0.05%
Other overseas assets	0.42%	0.57%	0.44%	0.35%
Total	100.00%	100.00%	100.00%	100.00%

Asset value ranges of funds – 2013

	\$1– \$50k	>\$50– \$100k	>\$100– \$200k	>\$200– \$500k
Listed trusts	1.64%	2.06%	2.73%	3.65%
Unlisted trusts	2.30%	3.97%	5.42%	6.14%
Insurance policy	0.02%	0.04%	0.03%	0.03%
Other managed investments	1.29%	2.22%	3.03%	4.10%
Cash and term deposits	54.91%	51.05%	48.66%	37.04%
Debt securities	0.14%	0.18%	0.29%	0.51%
Loans	1.98%	2.20%	1.55%	0.80%
Listed shares	21.63%	23.19%	23.98%	26.22%
Unlisted shares	1.96%	2.26%	1.69%	1.04%
Limited recourse borrowing arrangements	0.11%	0.33%	0.68%	3.36%

Non residential real property	0.86%	1.78%	3.71%	8.19%
Residential real property	0.67%	1.22%	1.93%	4.84%
Collectables and personal use assets	0.62%	0.71%	0.42%	0.20%
Other assets	10.77%	7.37%	4.76%	3.04%
Overseas shares	0.44%	0.45%	0.36%	0.32%
Overseas non-residential real property	0.06%	0.09%	0.04%	0.03%
Overseas residential real property	0.11%	0.26%	0.24%	0.11%
Overseas managed investments	0.03%	0.05%	0.05%	0.04%
Other overseas assets	0.45%	0.57%	0.43%	0.35%
Total	100.00%	100.00%	100.00%	100.00%

Asset value ranges of funds – 2014

	\$1– \$50k	>\$50– \$100k	>\$100– \$200k	>\$200– \$500k
Listed trusts	1.53%	1.97%	2.55%	3.64%
Unlisted trusts	2.36%	4.07%	5.53%	6.15%
Insurance policy	0.01%	0.03%	0.03%	0.02%
Other managed investments	1.28%	1.97%	2.76%	3.94%
Cash and term deposits	55.52%	51.59%	48.68%	35.18%
Debt securities	0.14%	0.19%	0.28%	0.54%
Loans	1.81%	2.11%	1.48%	0.71%
Listed shares	20.22%	21.91%	23.43%	25.72%
Unlisted shares	2.07%	2.32%	1.84%	0.99%
Limited recourse borrowing arrangements	0.34%	0.75%	1.20%	5.60%

Non residential real property	0.95%	1.91%	3.69%	8.24%
Residential real property	1.12%	1.58%	2.12%	5.29%
Collectables and personal use assets	0.65%	0.57%	0.39%	0.17%
Other assets	10.79%	7.61%	4.86%	3.02%
Overseas shares	0.38%	0.35%	0.32%	0.24%
Overseas non-residential real property	0.10%	0.06%	0.06%	0.03%
Overseas residential real property	0.22%	0.27%	0.29%	0.12%
Overseas managed investments	0.06%	0.06%	0.05%	0.05%
Other overseas assets	0.45%	0.68%	0.44%	0.35%
Total	100.00%	100.00%	100.00%	100.00%

Asset value ranges of funds – 2015

	\$1– \$50k	>\$50– \$100k	>\$100– \$200k	>\$200– \$500k
Listed trusts	1.46%	2.03%	2.85%	3.94%
Unlisted trusts	1.98%	3.78%	5.53%	6.21%
Insurance policy	0.01%	0.02%	0.01%	0.02%
Other managed investments	1.31%	2.02%	2.80%	4.01%
Cash and term deposits	54.90%	50.94%	47.56%	33.42%
Debt securities	0.08%	0.21%	0.27%	0.63%
Loans	1.35%	1.71%	1.16%	0.62%
Listed shares	22.30%	22.90%	24.23%	25.90%
Unlisted shares	2.28%	2.16%	1.82%	0.93%
Limited recourse borrowing arrangements	0.24%	0.72%	1.39%	7.14%

Non residential real property	0.86%	1.90%	3.56%	7.82%
Residential real property	1.10%	2.02%	2.36%	5.39%
Collectables and personal use assets	0.47%	0.46%	0.33%	0.12%
Other assets	10.46%	7.65%	4.90%	2.97%
Overseas shares	0.50%	0.48%	0.44%	0.39%
Overseas non-residential real property	0.04%	0.08%	0.05%	0.02%
Overseas residential real property	0.19%	0.30%	0.25%	0.09%
Overseas managed investments	0.03%	0.04%	0.06%	0.06%
Other overseas assets	0.43%	0.57%	0.45%	0.33%
Total	100.00%	100.00%	100.00%	100.00%

Membership sizes table

This table contains an approximate distribution of the number of members in SMSFs as at the end of each financial year for the 2011 through to the 2015 years. These figures are based on SMSF annual return data.

The data was extracted on 12 July 2016.

Proportion of funds (%)

Number of members	2010–11	2011–12	2012–13	2013–14	2014–15
1	22.9%	22.8%	22.6%	22.6%	22.7%
2	68.5%	68.8%	69.2%	69.5%	69.8%
3	4.3%	4.1%	4.0%	3.8%	3.7%
4	4.4%	4.3%	4.2%	4.1%	3.9%

Demographic table

This table contains estimates of the proportion of funds, members and assets located across the different states and territories of Australia.

'State' refers to the state or territory that the fund is administered, not necessarily where the members live.

These figures are estimates based on SMSF annual return data for the 2011 to 2015 financial years.

The data was extracted on 12 July 2016.

Funds

State	2010–11	2011–12	2012–13	2013–14	2014–15
ACT	1.7%	1.8%	1.8%	1.9%	1.7%

NSW	31.7%	31.8%	32.0%	32.5%	32.7%
NT	0.2%	0.2%	0.2%	0.2%	0.2%
QLD	16.8%	16.6%	16.4%	16.3%	16.6%
SA	7.1%	7.1%	7.2%	7.1%	7.1%
TAS	1.4%	1.4%	1.4%	1.4%	1.3%
VIC	30.4%	30.6%	30.8%	30.6%	30.4%
WA	10.6%	10.4%	10.3%	10.1%	9.9%

Members

State	2010–11	2011–12	2012–13	2013–14	2014–15
ACT	1.8%	1.8%	1.8%	1.9%	1.7%
NSW	31.7%	31.9%	32.0%	32.6%	32.8%
NT	0.2%	0.2%	0.2%	0.2%	0.2%
QLD	16.9%	16.6%	16.4%	16.3%	16.6%
SA	7.2%	7.2%	7.2%	7.1%	7.1%
TAS	1.4%	1.4%	1.4%	1.4%	1.3%
VIC	30.3%	30.5%	30.7%	30.5%	30.4%

WA	10.6%	10.4%	10.3%	10.1%	10.0%
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Assets

State	2010–11	2011–12	2012–13	2013–14	2014–15
ACT	1.7%	1.8%	1.8%	1.9%	1.8%
NSW	32.2%	32.3%	32.6%	33.4%	34.3%
NT	0.2%	0.2%	0.2%	0.2%	0.2%
QLD	16.6%	16.4%	16.1%	15.7%	15.8%
SA	7.1%	7.2%	7.3%	7.3%	7.2%
TAS	1.3%	1.3%	1.3%	1.2%	1.2%
VIC	30.6%	30.8%	31.1%	30.8%	30.3%
WA	10.3%	10.1%	9.7%	9.5%	9.3%

Member demographic table – age ranges

This table contains an approximate age distribution of individuals who were members of SMSFs as at the end of June 2016. The data behind this table was extracted on 12 July 2016 and is an estimate based on Australian business register (ABR) data.

In the table below, '.' indicates the proportion has been rounded to zero, but is not equal to zero.

Member demographic table – age ranges

Age ranges	Male	Female	Total
<25	0.7%	0.7%	0.7%
25–34	3.9%	4.1%	4.0%
35–44	12.2%	13.5%	12.8%
45–49	10.0%	11.1%	10.5%
50–54	11.8%	12.7%	12.3%
55–59	13.5%	14.3%	13.9%
60–64	13.7%	14.4%	14.1%
65–69	14.3%	13.9%	14.2%
70–74	10.3%	8.8%	9.6%
75–84	8.4%	5.9%	7.2%
85+	1.1%	0.6%	0.9%
Unknown	0.0%	0.0%	0.0%
Total	100%	100%	100%
All ages	52.6%	47.4%	100%

Member demographic table – income ranges

This table contains an approximate distribution of the taxable income of individuals who were SMSF members as at the end of June 2016. The data was extracted on 12 July 2016 and is an estimate based on ABR data and the member's most recently lodged personal tax return.

Member demographic table – income ranges

Income ranges	Male	Female	Total
\$0–\$20,000	18.5%	25.4%	21.8%
>\$20,000–\$40,000	16.2%	21.5%	18.7%
>\$40,000–\$60,000	11.4%	14.3%	12.8%
>\$60,000–\$80,000	11.1%	11.0%	11.1%
>\$80,000–\$100,000	8.6%	7.2%	7.9%
>\$100,000–\$150,000	12.2%	7.6%	10.0%
>\$150,000–\$200,000	7.4%	4.5%	6.0%
>\$200,000–\$500,000	8.3%	3.6%	6.1%
>\$500,000	2.6%	0.8%	1.7%
Unknown	3.8%	4.1%	3.9%
Total	100%	100%	100%

Total asset range tables

These tables show an approximate distribution of SMSFs by asset size and of the assets held by SMSFs of different sizes as at the end of each financial year.

These figures are estimates based on SMSF annual return data for the 2011 to 2015 financial years.

The data was extracted on 12 July 2016.

Total asset range table – proportion of funds (%)

Asset ranges	2010–11	2011–12	2012–13	2013–14	2014–15
\$1–\$50,000	7.3%	7.5%	7.4%	6.7%	6.1
>\$50,000–\$100,000	5.9%	6.0%	5.5%	4.8%	4.1
>\$100,000–\$200,000	11.5%	11.6%	10.9%	10.0%	8.9
>\$200,000–\$500,000	25.2%	25.5%	24.8%	24.2%	23.7
>\$500,000–\$1m	22.6%	22.7%	22.8%	23.4%	24.2
>\$1m–\$2m	16.6%	16.3%	17.0%	17.9%	18.8
>\$2m–\$5m	9.0%	8.7%	9.6%	10.5%	11.4
>\$5m–\$10m	1.6%	1.5%	1.8%	2.1%	2.3
>\$10m	0.3%	0.3%	0.4%	0.5%	0.5
Total	100%	100%	100%	100%	100

Total asset range table – proportion of assets (%)

Asset ranges	2010–11	2011–12	2012–13	2013–14	2014–15
\$1–\$50,000	0.1%	0.2%	0.1%	0.1%	0.1
>\$50,000–\$100,000	0.5%	0.5%	0.4%	0.3%	0.3
>\$100,000–\$200,000	1.8%	1.9%	1.7%	1.4%	1.2
>\$200,000–\$500,000	9.2%	9.6%	8.7%	8.0%	7.4
>\$500,000–\$1m	17.6%	18.0%	16.9%	16.1%	15.7
>\$1m–\$2m	25.1%	25.1%	24.6%	24.0%	23.8
>\$2m–\$5m	28.7%	28.4%	29.4%	29.9%	30.5
>\$5m–\$10m	11.1%	10.9%	12.0%	13.1%	13.5
>\$10m	5.7%	5.5%	6.1%	7.0%	7.6
Total	100%	100%	100%	100%	100

Average and median assets table (\$)

This table approximates the average and median assets per SMSF member and per SMSF at the end of each financial year.

These figures are estimates based on SMSF annual return data for the 2011 to 2015 financial years.

The data was extracted on 12 July 2016.

Average and median assets table (\$)

Asset values	2010–11	2011–12	2012–13	2013–14	2014–15
Average assets per member	485,682	475,698	510,136	551,217	592,348
Median assets per member	282,608	275,313	299,407	325,542	351,217
Average assets per SMSF	923,499	902,917	968,139	1,043,812	1,118,917
Median assets per SMSF	506,539	493,348	535,274	581,710	628,917

Flow of funds table (\$m)

This table shows estimates of the total amount of ‘flows’ into and out of SMSFs during each financial year. It contains totals relating to the following:

- contributions – member and employer
- transfers – inward and outward
- benefits payments
- operating expenses.

Changes were made to the 2012–13 SMSF annual return to collect both deductions and non-deductible expenses. The operating expense

figures for 2013 onwards incorporates deductible and non-deductible expenses data.

These figures are estimates based on SMSF annual return data for the 2011 to 2015 financial years.

The data was extracted on 12 July 2016.

Flow of funds table (\$m)

	Contributions (\$m)		Transfers (\$m)	
	Member contributions	Employer contributions	Inward transfers	Outward transfers
2010–11	16,800	6,965	15,546	
2011–12	19,168	7,500	16,051	
2012–13	18,057	5,460	16,648	
2013–14	19,891	6,068	15,364	
2014–15	25,920	6,930	15,561	

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June 2016 quarter establishment tables

Funds established between 1 April 2016 and 30 June 2016.

On this page

2016 quarterly establishments demographic table – location

2016 quarterly establishments demographic table – age ranges

2016 quarterly establishments demographic table – income ranges

The following tables relate to funds established between 1 April 2016 and 30 June 2016. They contain demographic information of funds, as well as individual members. The data is sourced from the Australian business register (ABR) at the time of registration.

2016 quarterly establishments demographic table – location

This table contains the proportion of funds located across the different states and territories of Australia, for SMSFs established during the June 2016 quarter.

'State' refers to the state or territory that the fund is administered, not necessarily where the members live.

The data behind this table was extracted on 12 July 2016 based on ABR data as at that date.

2016 quarterly establishments demographic table by location

State	ACT	NSW	NT	QLD	SA	TAS
Number of funds	1.2%	38.4%	0.1%	18.6%	5.0%	0.7%

2016 quarterly establishments demographic table – age ranges

This table contains an age distribution of individual members of SMSFs established during the June 2016 quarter.

The data behind this table was extracted on 12 July 2016 based on ABR data as at that date.

In the table below, '.' indicates the proportion has been rounded to zero but is not equal to zero.

2016 quarterly establishments demographic table by age ranges

Age ranges	Male	Female	Total
< 25	1.4%	1.6%	1.5%
25-34	10.2%	12.3%	11.2%
35-44	29.0%	30.1%	29.5%
45-49	16.9%	16.9%	16.9%
50-54	15.6%	15.0%	15.3%
55-59	12.9%	12.0%	12.5%
60-64	8.6%	7.2%	7.9%
65-69	3.8%	3.8%	3.8%
70-74	1.4%	0.9%	1.1%
75-84	0.3%	0.2%	0.3%
85+	0.0%	0.0%	0.0%
Unknown	0.0%	0.0%	0.0%

Total	100.0%	100.0%	100.0%
All ages	53.1%	46.9%	100.0%

2016 quarterly establishments demographic table – income ranges

This table contains an approximate distribution of the taxable income of the members of SMSFs established during the June 2016 quarter. The data was extracted on 12 July 2016 based on ABR data and the member's most recently lodged individual tax return as at that date.

2016 quarterly establishments demographic table by income ranges

Income ranges	Male	Female	Total
\$0–\$20,000	5.9%	15.3%	10.3%
>\$20,000–\$40,000	10.6%	19.7%	14.9%
>\$40,000–\$60,000	12.1%	17.5%	14.6%
>\$60,000–\$80,000	16.0%	15.4%	15.7%
>\$80,000–\$100,000	12.0%	9.7%	10.9%
>\$100,000–\$150,000	19.4%	9.3%	14.7%
>\$150,000–\$200,000	10.3%	4.8%	7.7%
>\$200,000–\$500,000	9.3%	3.8%	6.7%
>\$500,000	2.1%	0.6%	1.4%

Unknown	2.3%	3.9%	3.0%
Total	100.0%	100.0%	100.0%

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