**Table 10: Levy parameters**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Industry** | **Criteria** | **2018-19** | **2019-20** |  |
| **Actual** | **Forecast** | **Change  (%)** |
| **ADIs - locally incorporated** | **Restricted:** |  |  |  |
| Rate % | 0.00420 | 0.00501 | 19.3% |
| Minimum | 15,000 | 15,000 | - |
| Maximum | 3,000,000 | 3,125,000 | 4.2% |
| **Unrestricted rate (%)** | 0.001025 | 0.000955 | (6.8%) |
| **ADIs - foreign branches** | **Restricted:** |  |  |  |
| Rate % | 0.00084 | 0.00100 | 19.0% |
| Minimum | 15,000 | 15,000 | - |
| Maximum | 600,000 | 625,000 | 4.2% |
| **Unrestricted rate (%)** | 0.001025 | 0.000955 | (6.8%) |
| **Life insurers / Friendly societies** | **Restricted:** |  |  |  |
| Rate % | 0.01009 | 0.01348 | 33.6% |
| minimum | 15,000 | 15,000 | - |
| maximum | 750,000 | 1,110,000 | 48.0% |
| **Unrestricted rate (%)** | 0.003365 | 0.003148 | (6.4%) |
| **General insurers** | **Restricted:** |  |  |  |
| Rate % | 0.01556 | 0.02267 | 45.7% |
| minimum | 15,000 | 15,000 | - |
| maximum | 900,000 | 1,300,000 | 44.4% |
| **Unrestricted rate (%)** | 0.009966 | 0.007427 | (25.5%) |
| **Superannuation funds** | **Restricted:** |  |  |  |
| Rate % | 0.00274 | 0.00324 | 18.2% |
| minimum | 5,000 | 5,000 | - |
| maximum | 325,000 | 600,000 | 84.6% |
| **Unrestricted rate (%)** | 0.003911 | 0.003557 | (9.1%) |
| **Superannuation funds - Pooled Superannuation Trusts** | **Restricted:** |  |  |  |
| Rate % | 0.00137 | 0.00162 | 18.2% |
| minimum | 5,000 | 5,000 | - |
| maximum | 162,500 | 300,000 | 84.6% |
| **Unrestricted rate (%)** | 0.001040 | 0.000799 | (23.2%) |

**Table 11: Amounts levied on ADIs**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Asset base** | **$50m  ($'000)** | **$500m  ($'000)** | **$5b  ($'000)** | **$25b  ($'000)** | **$100b  ($'000)** | **$800b  ($'000)** |
| 2017-18 | 10.5 | 25.0 | 250.3 | 1,251.7 | 4,092.2 | 11,738.0 |
| 2018-19 | 15.5 | 26.1 | 261.1 | 1,305.5 | 4,025.5 | 11,203.9 |
| 2019-20 | 15.5 | 29.8 | 298.2 | 1,490.9 | 4,080.3 | 10,767.7 |

**Table 12: Amounts levied on foreign ADI branches**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Asset base** | **$500m  ($'000)** | **$5b  ($'000)** | **$25b  ($'000)** | **$50b  ($'000)** |
| 2017-18 | 15.5 | 119.6 | 598.0 | 1,196.0 |
| 2018-19 | 20.1 | 93.2 | 466.2 | 932.4 |
| 2019-20 | 19.8 | 97.9 | 489.3 | 978.5 |

**Table 13: Amounts levied on Life insurers/ Friendly societies**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Asset base** | **$50m  ($'000)** | **$500m  ($'000)** | **$5b  ($'000)** | **$10b  ($'000)** | **$50b  ($'000)** | **$100b  ($'000)** |
| 2017-18 | 12.4 | 65.7 | 657.2 | 1,314.3 | 3,412.9 | 5,825.8 |
| 2018-19 | 16.7 | 67.3 | 672.6 | 1,086.5 | 2,432.4 | 4,114.7 |
| 2019-20 | 16.6 | 83.1 | 831.5 | 1,424.8 | 2,683.8 | 4,257.7 |

**Table 14: Amounts levied on General insurers**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Asset base** | **$15m  ($'000)** | **$50m ($'000)** | **$250m ($'000)** | **$1b ($'000)** | **$5b ($'000)** | **$15b ($'000)** |
| 2017-18 | 12.0 | 16.7 | 65.9 | 263.6 | 1,318.0 | 3,017.1 |
| 2018-19 | 16.5 | 20.0 | 63.8 | 255.3 | 1,276.4 | 2,394.9 |
| 2019-20 | 16.1 | 18.7 | 75.3 | 301.0 | 1,505.1 | 2,414.0 |

**Table 15: Amounts levied on Superannuation funds (excluding SAFs and PSTs)**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Asset base** | **$5m ($'000)** | **$50m ($'000)** | **$250m ($'000)** | **$1b ($'000)** | **$20b ($'000)** | **$50b ($'000)** | **$100b ($'000)** |
| 2017-18 | 3.8 | 6.3 | 21.8 | 87.3 | 1,431.0 | 3,127.5 | 5,955.0 |
| 2018-19 | 5.2 | 7.0 | 16.6 | 66.5 | 1,107.1 | 2,280.3 | 4,235.7 |
| 2019-20 | 5.2 | 6.8 | 17.0 | 68.0 | 1,311.4 | 2,378.5 | 4,157.0 |

**Table 16: Amounts levied on PSTs**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Asset base** | **$10m ($'000)** | **$50m ($'000)** | **$500m ($'000)** | **$5b ($'000)** | **$10b ($'000)** | **$20b ($'000)** | **$50b ($'000)** |
| 2017-18 | 3.6 | 4.2 | 14.7 | 147.5 | 291.3 | 432.6 | 856.5 |
| 2018-19 | 5.1 | 5.5 | 12.1 | 120.6 | 241.2 | 370.5 | 682.5 |
| 2019-20 | 5.1 | 5.4 | 12.1 | 120.9 | 241.9 | 459.9 | 699.7 |