

Rivkin Local Blue Chip Strategy

1 FEBRUARY 2019

The Blue Chip Strategy is one of the five strategies that constitute the Rivkin Local Advice. This strategy invests in ten stocks, contained in the ASX 50 index, and rebalances on an 'as-needed' basis. The old four portfolio strategy was replaced with the single portfolio version so returns below represent a blend of the new and old strategies.

Shows performance over year from 1 February 2018 to 1 February 2019. For complete trade history, please see website.

RETURN PROFILE	AMOUNT*
Since 1 February 2018	3.0%
Average annual return over 15 year back-tested period	9.1%
ASX 50 return since 1 February 2018	2.4%

ROLLING RETURNS	3-MONTH	6-MONTH	9-MONTH	12-MONTH
Return	7.8%	3.7%	7.1%	3.0%

BLUE CHIPS

STOCK	STATUS	ENTRY MONTH	ENTRY PRICE	EXIT MONTH	EXIT PRICE	GROSS P/L (%)
SUN	Closed	Nov-17	\$13.64	Sep-18	\$15.49	13.56%
VCX	Closed	Mar-18	\$11.09	Sep-18	\$12.51	12.80%
WES	Closed	Nov-17	\$41.86	Sep-18	\$51.65	23.39%

*Open Price used for recently opened trades

**Close Price used for closed trades

*Past performance is no guarantee to future performance

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