

Rivkin Local Momentum Strategy

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The Momentum Strategy is one of five Rivkin Local strategies and makes up approximately 25% of Rivkin Local's overall Model Portfolio. This strategy identifies the strongest trending ASX stocks from the S&P ASX100 universe and aims to hitch a ride on their upward movements.

Shows trade data from November 2018 to January 2019. Please see the website for complete trade history since inception in May 2016.

RETURN PROFILE	AMOUNT*
Since 1 February 2018	4.5%
Average annual return over 15 year back-tested period	22.7%
ASX 100 return since 1 February 2018	1.6%

ROLLING RETURNS	3-MONTH	6-MONTH	9-MONTH	12-MONTH
Return	-4.2%	-12.1%	-4.8%	4.5%

CLOSED TRADES (LAST 3 MONTHS)

STOCK	STATUS	ENTRY MONTH	ENTRY PRICE	EXIT MONTH	EXIT PRICE*	GROSS P/L (%)
WHC	Closed	Jul-18	\$5.70	Nov-18	\$4.67	-18.07%
NST	Closed	Oct-18	\$9.00	Dec-18	\$8.07	-10.33%

*Exit price adjusted upward for dividends

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