

Rivkin Local Model Performance

1 FEBRUARY 2019

RIVKIN LOCAL MODEL PORTFOLIO

STRATEGY	BALANCE AT 1 OCTOBER 2018	BALANCE AT 31 JANUARY 2019	CHANGE (%)
Momentum	\$25,000	\$21,663	-13.3%
Value	\$25,000	\$22,722	-9.1%
Blue Chip	\$25,000	\$25,905	3.6%
Event	\$25,000	\$25,921	3.7%
Income	\$25,000	\$25,299	1.2%

Model portfolios are denominated in AUD and represent live account performance excluding brokerage.

SUMMARY 12 MONTH PERFORMANCE

MOMENTUM	BLUE CHIPS	INCOME	EVENT	VALUE*
4.5%	3.0%	6.0%	4.3%	3.3%

*Since inception

See Individual strategy documents for detailed Momentum and Blue Chips performance.

LOCAL EVENT

The Event Strategy is one of four Rivkin Local strategies and makes up approximately 25% of Rivkin Local's overall Model Portfolio. It seeks to capitalise on specific 'events' (such as company takeovers) on stocks listed on the ASX that we believe provide a catalyst from which we can profit from a mis-pricing in the market in a relatively short period of time.

Shows performance for trades closed between 1 October 2018 to 1 February 2019. For complete trade history, please see website.

STOCK	STATUS	ENTRY MONTH	ENTRY PRICE	EXIT MONTH	EXIT / CURRENT PRICE	DIVIDENDS	GROSS P/L (%)
MUA	Closed	Jul-18	\$0.72	Dec-18	\$0.80	\$0.00	11.89%
CZZ	Closed	Aug-18	\$19.55	Dec-18	\$21.00	\$0.00	7.42%
SMR	Closed	Dec-18	\$0.99	Jan-19	\$0.96	\$0.00	-3.03%

* Entry Price

If you had invested \$50,000 in the income strategy at February 1 2018, you would have made a return of \$3,000

Contact us

DISCLAIMER:

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