

# Rivkin ASX Blue Chip Strategy

1 MARCH 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 March 2018 to 1 March 2019. For complete trade history, please see website.

RETURN PROFILE	AMOUNT*
Since 1 March 2018	6.4%
Average annual return over 15 year back-tested period	9.1%
ASX 50 return since 1 March 2018	8.3%

ROLLING RETURNS	3-MONTH	6-MONTH	9-MONTH	12-MONTH
Return	12.7%	6.9%	12.8%	6.4%

## OPEN TRADES

STOCK	STATUS	ENTRY MONTH	ENTRY PRICE	EXIT MONTH	EXIT PRICE	GROSS P/L (%)
AMP	Closed	Nov-17	\$2.45	Feb-19	\$2.26	-7.76%
FMG	Closed	Nov-17	\$4.19	Feb-19	\$5.70	36.04%
RIO	Closed	Sep-18	\$78.47	Feb-19	\$87.99	12.13%

To preview our current open trades, start your **FREE TRIAL** now

## CLOSED TRADES (LAST 3 MONTHS)

STOCK	STATUS	ENTRY MONTH	ENTRY PRICE	EXIT MONTH	EXIT PRICE	GROSS P/L (%)
AMP	Closed	Nov-17	\$2.45	Feb-19	\$2.26	-7.76%
FMG	Closed	Nov-17	\$4.19	Feb-19	\$5.70	36.04%
RIO	Closed	Sep-18	\$78.47	Feb-19	\$87.99	12.13%

\*\*Close Price used for closed trades

\*Past performance is no guarantee to future performance

[www.rivkin.com.au](http://www.rivkin.com.au) | 1300 748 546

# Contact us

## DISCLAIMER:

Rivkin aims to provide clear and simple information to those reading this eBook. If any part of this disclaimer does not make sense, please phone Rivkin and ask to speak with a member of our Dealing and Relationship Management Team. Rivkin provides general advice, securities and derivatives dealing services and accounting administration services. Rivkin does not provide advice that takes into account your, or anybody else's, investment objectives, financial situation or needs. We strongly suggest that you consult an independent, licenced financial advisor before acting upon any information contained on this website. Investing in and trading securities (such as shares listed on the ASX) and/or derivatives (such as Contracts for Difference or 'CFDs') carry financial risks. CFDs carry with them various additional risks that differ from more simple securities such as fully-paid company shares. Some of these risks include not owning the underlying instrument from which a price is being derived, settling trades 'over the counter' with a financial institution rather than on a stock exchange, and using leverage to gain access to trades that may have a higher face value than your initial deposit. This risk of leverage means that it is possible to lose more than your initial investment. Our aim is to create more life choices for our clients, which means improving the wealth of clients throughout many market cycles by nurturing a relationship spanning many years. If you are not comfortable with your understanding of the risks involved before using a Rivkin product and service, please contact our office or go to [www.rivkin.com.au](http://www.rivkin.com.au) to seek further information or a Product Disclosure Statement, or make an appointment to sit with one of our friendly financial experts. It is in our interest for your Rivkin experience to be a rewarding and comfortable one. Rivkin is a trading name of Rivkin Securities ABN 87123290602, which holds Australian Financial Services Licence No. 332 802.



**1300 748 546**



**[info@rivkin.com.au](mailto:info@rivkin.com.au)**



**[www.rivkin.com.au](http://www.rivkin.com.au)**



**@RivkinLive**



**/RivkinSecurities**