

Rivkin Local Model Performance

1 MARCH 2019

RIVKIN LOCAL MODEL PORTFOLIO

STRATEGY	BALANCE AT 1 OCTOBER 2018	BALANCE AT 28 FEBRUARY 2019	CHANGE (%)
Momentum	\$25,000	\$21,710	-13.2%
Value	\$25,000	\$26,190	4.8%
Blue Chip	\$25,000	\$27,169	8.7%
Event	\$25,000	\$26,129	4.5%
Income	\$25,000	\$25,635	2.5%

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

SUMMARY 12 MONTH PERFORMANCE

MOMENTUM	BLUE CHIPS	INCOME	EVENT	VALUE*
-2.2%	6.4%	7.8%	3.4%	20.2%

*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 November 2018 to 1 March 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%

LOCAL INCOME

The Rivkin Local Income Strategy is one of four Rivkin Local strategies and makes up approximately 20% of Rivkin Local's overall Model Portfolio. It aims to provide members with a blend of cash flow, and – in cases where yield is highly sought after – capital gains.

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

To preview our current local income, start your **FREE TRIAL** now

* Entry Price

If you had invested \$50,000 in the income strategy at March 1 2018, you would have made a return of \$3,900

Contact us

DISCLAIMER:

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