

Rivkin Local Model Performance

1 APRIL 2019

RIVKIN LOCAL MODEL PORTFOLIO

STRATEGY	BALANCE AT 1 OCTOBER 2018	BALANCE AT 31 MARCH 2019	CHANGE (%)
Momentum	\$25,000	\$23,539	-5.8%
Value	\$25,000	\$26,202	4.8%
Blue Chip	\$25,000	\$27,389	9.6%
Event	\$25,000	\$24,771	-0.9%
Income	\$25,000	\$25,850	3.4%

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

SUMMARY 12 MONTH PERFORMANCE

MOMENTUM	BLUE CHIPS	INCOME	EVENT	VALUE*
7.5%	18.6%	9.7%	2.6%	22.5%

*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 December 2018 to 1 April 2019. For complete trade history, please see website.

STOCK	STATUS	ENTRY MONTH	ENTRY PRICE	EXIT MONTH	EXIT / CURRENT PRICE	DIVIDENDS	GROSS P/L (%)
SMR	Closed	Dec-18	\$0.99	Jan-19	\$0.96	\$0.00	-3.03%
GXL	Closed	Nov-18	\$5.36	Feb-19	\$5.55	\$0.00	3.54%
TRS	Closed	Dec-18	\$2.75	Mar-19	\$2.70	\$0.00	-1.82%
MYO	Closed	Jan-19	\$3.35	Mar-19	\$3.35	\$0.00	0.00%

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 April 2018 to 1 April 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 April 1 2018, you would have made a return of \$3,900

Contact us

DISCLAIMER:

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