

Rivkin ASX Blue Chip Strategy

1 AUGUST 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 May 2019 to July 2019. For complete trade history, please see website.

RETURN PROFILE	AMOUNT*
Since 1 August 2018	20.7%
Average annual return over 15 year back-tested period	9.1%
ASX 50 return since 1 August 2018	15.1%

ROLLING RETURNS	3-MONTH	6-MONTH	9-MONTH	12-MONTH
Return	2.5%	11.8%	19.9%	20.7%

OPEN TRADES

BLUE CHIPS

YTD RETURN

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%
AGL	Closed	Sep-18	\$20.79	Jun-19	\$20.28	-2.45%
AZJ	Closed	Sep-18	\$4.25	Jun-19	\$5.14	20.94%
TLS	Closed	Oct-17	\$3.54	Jun-19	\$3.61	1.98%

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*Open Price used for recently opened trades

**Close Price used for closed trades

CLOSED TRADES (LAST 3 MONTHS)

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*Past performance is no guarantee to future performance

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Contact us

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