

# Rivkin Local Model Performance

1 AUGUST 2019

## RIVKIN LOCAL MODEL PORTFOLIO

STRATEGY	BALANCE AT 1 OCTOBER 2018	BALANCE AT 31 JUL 2019	CHANGE (%)
Momentum	\$25,000	\$28,626	14.50%
Value	\$25,000	\$32,139	28.56%
Blue Chip	\$25,000	\$29,010	16.04%
Event	\$25,000	\$25,637	2.55%
Income	\$25,000	\$26,799	7.20%

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

## SUMMARY 12 MONTH PERFORMANCE

MOMENTUM	BLUE CHIPS	INCOME	EVENT	VALUE*
17.7%	20.7%	8.7%	2.5%	29.9%

\*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 March 2019 to 1 August 2019. For complete trade history, please see website.

STOCK	STATUS	ENTRY MONTH	ENTRY PRICE	EXIT MONTH	EXIT / CURRENT PRICE	DIVIDENDS	GROSS P/L (%)
TRS	Closed	Dec-18	\$2.75	Mar-19	\$2.70	\$-	-1.82%
MYO	Closed	Jan-19	\$3.35	Mar-19	\$3.35	\$-	0.00%
TME	Closed	Dec-19	\$6.07	May-19	\$6.07	\$-	0.00%
NTC	Closed	Apr-19	\$1.07	Jul-19	\$1.10	\$-	2.80%

## 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 August 2018 to 1 August 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 August 1 2018, you would have made a return of \$5800

# 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**