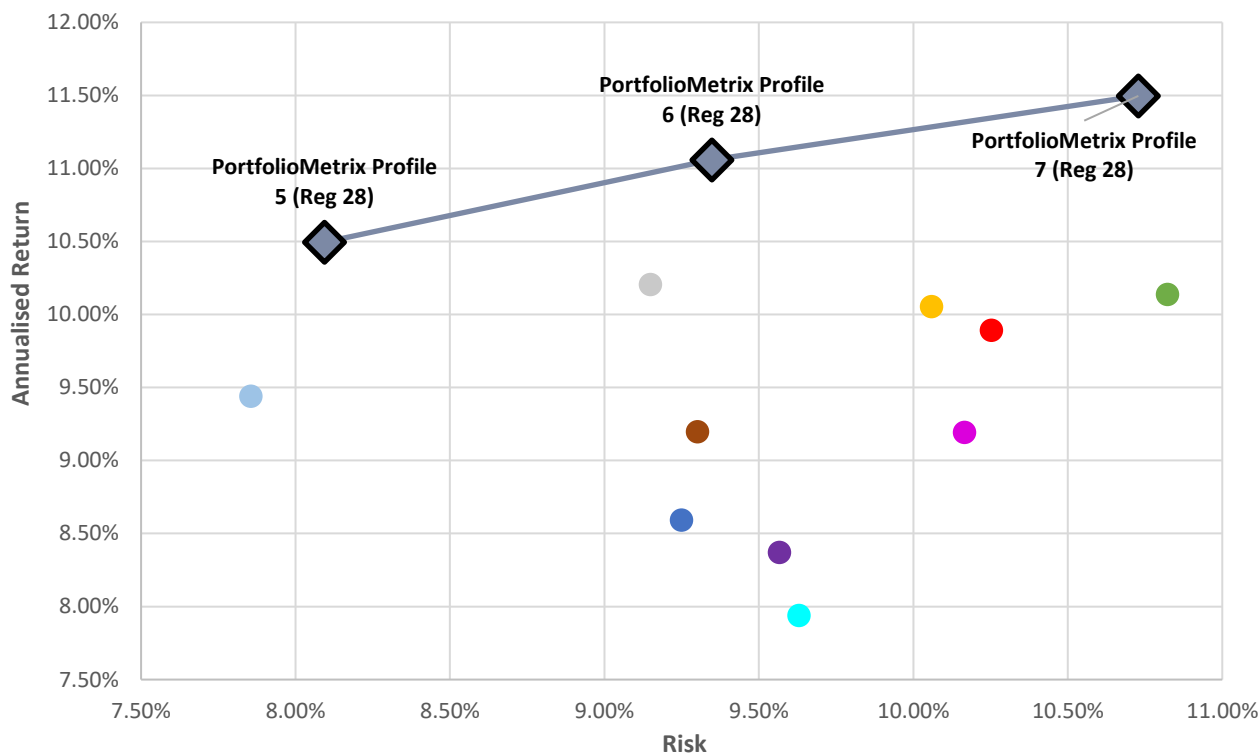


**INDUSTRY COMPARISON - INCEPTION (03/12/2010 TO 29/03/2024, WEEKLY RISK)**

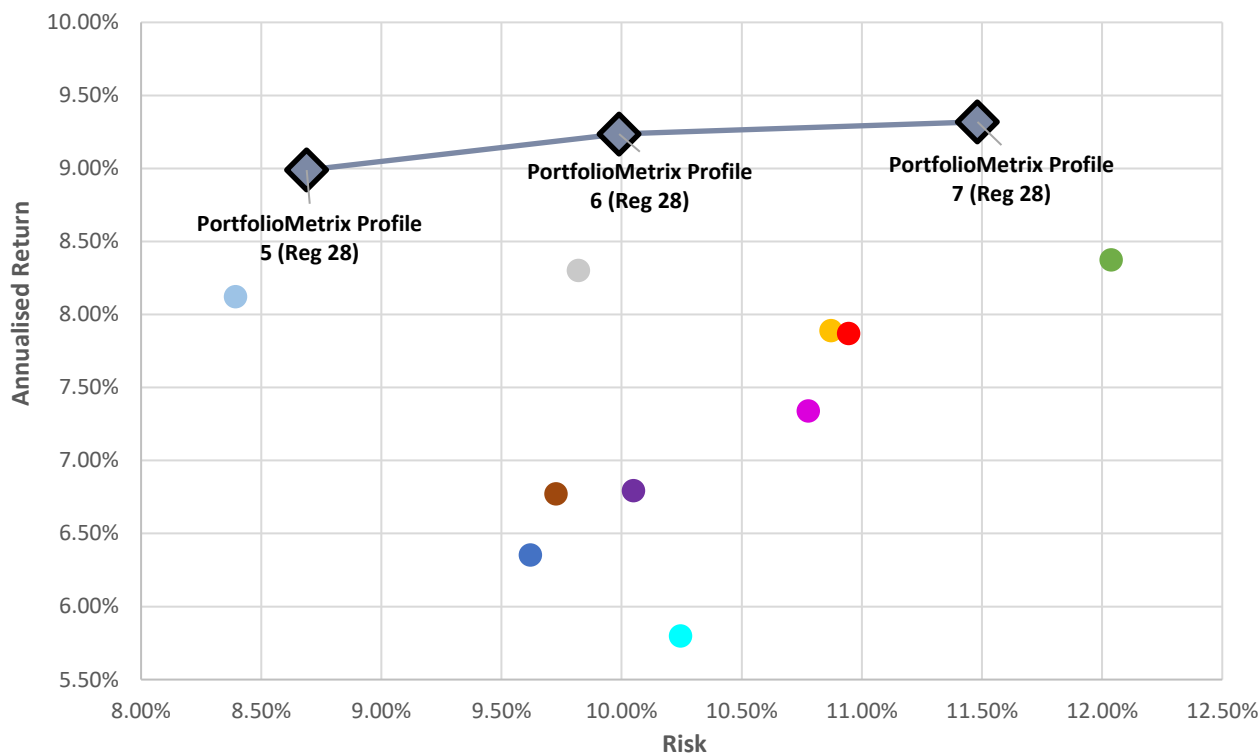


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetrix Profile 7 (Reg 28)</b>	<b>10.73%</b>	<b>329.12%</b>	<b>11.50%</b>
<b>PortfolioMetrix Profile 6 (Reg 28)</b>	<b>9.35%</b>	<b>307.09%</b>	<b>11.06%</b>
<b>PortfolioMetrix Profile 5 (Reg 28)</b>	<b>8.09%</b>	<b>280.30%</b>	<b>10.50%</b>
● Allan Gray Balanced - A	9.15%	267.24%	10.21%
● Coronation Balanced Plus - A	10.06%	260.56%	10.06%
● Discovery Balanced - A	10.16%	224.54%	9.19%
● Foord Balanced - R	9.30%	224.67%	9.20%
● Ninety One Opportunity - A	7.85%	234.55%	9.44%
● Old Mutual Balanced - A	9.57%	193.33%	8.37%
● M&G Balanced - A	10.25%	253.51%	9.89%
● PSG Balanced - A	10.82%	264.19%	10.14%
● Sanlam Balanced - A	9.63%	178.03%	7.94%
● STANLIB Multi-Strategy Growth B1	9.25%	201.48%	8.59%

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**INDUSTRY COMPARISON - 10 YEAR (11/04/2014 TO 29/03/2024, WEEKLY RISK)**

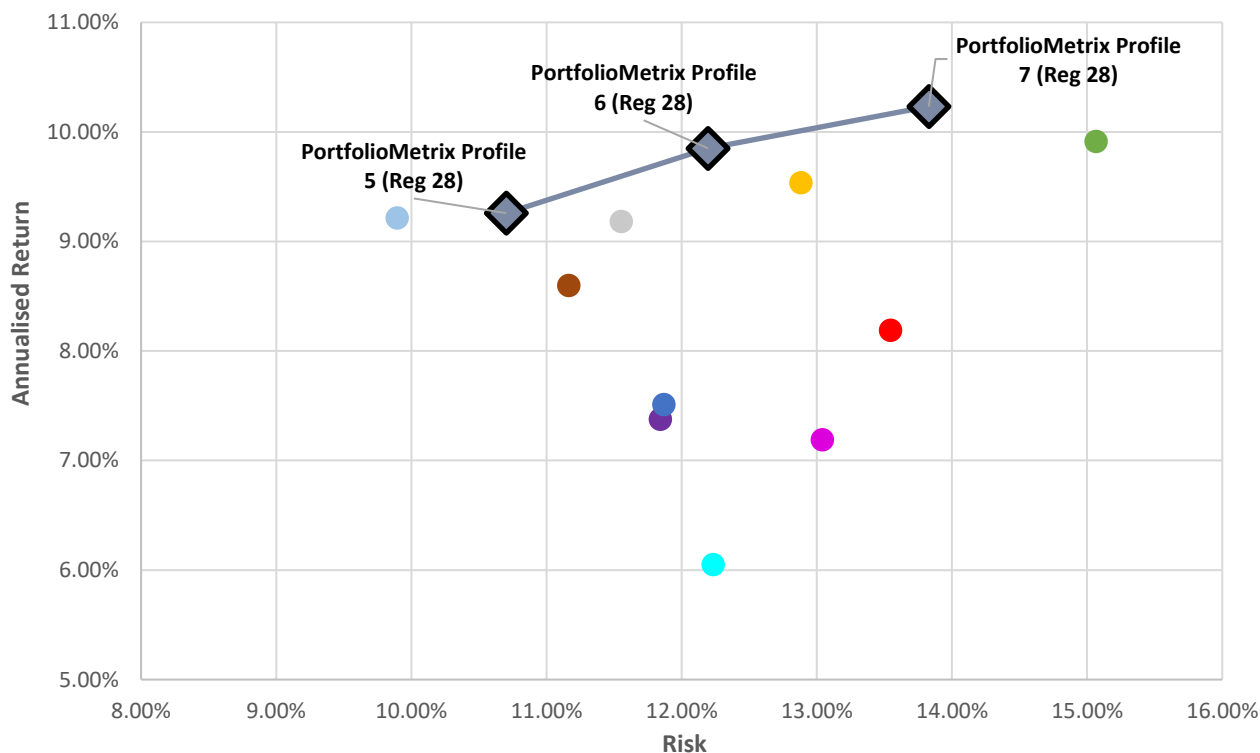


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetric Profile 7 (Reg 28)</b>	<b>11.48%</b>	<b>143.75%</b>	<b>9.32%</b>
<b>PortfolioMetric Profile 6 (Reg 28)</b>	<b>9.99%</b>	<b>141.90%</b>	<b>9.24%</b>
<b>PortfolioMetric Profile 5 (Reg 28)</b>	<b>8.69%</b>	<b>136.50%</b>	<b>8.99%</b>
● Allan Gray Balanced - A	9.82%	122.04%	8.30%
● Coronation Balanced Plus - A	10.87%	113.72%	7.89%
● Discovery Balanced - A	10.78%	103.06%	7.34%
● Foord Balanced - R	9.73%	92.56%	6.77%
● Ninety One Opportunity - A	8.39%	118.35%	8.12%
● Old Mutual Balanced - A	10.05%	92.99%	6.80%
● M&G Balanced - A	10.94%	113.33%	7.87%
● PSG Balanced - A	12.04%	123.51%	8.38%
● Sanlam Balanced - A	10.24%	75.75%	5.80%
● STANLIB Multi-Strategy Growth B1	9.62%	85.14%	6.35%

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**INDUSTRY COMPARISON - 5 YEAR (05/04/2019 TO 29/03/2024, WEEKLY RISK)**

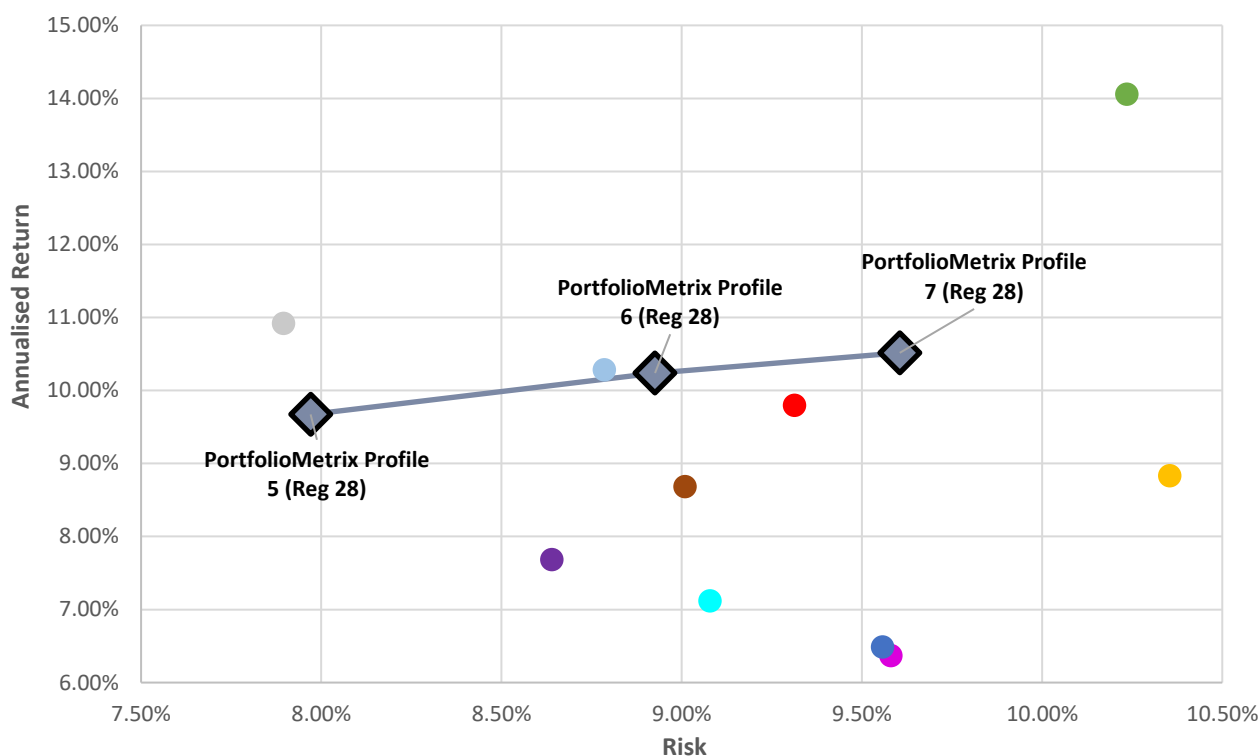


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetric Profile 7 (Reg 28)</b>	<b>13.83%</b>	<b>62.76%</b>	<b>10.23%</b>
<b>PortfolioMetric Profile 6 (Reg 28)</b>	<b>12.20%</b>	<b>59.95%</b>	<b>9.85%</b>
<b>PortfolioMetric Profile 5 (Reg 28)</b>	<b>10.70%</b>	<b>55.69%</b>	<b>9.26%</b>
● Allan Gray Balanced - A	11.55%	55.17%	9.18%
● Coronation Balanced Plus - A	12.88%	57.69%	9.54%
● Discovery Balanced - A	13.04%	41.51%	7.19%
● Foord Balanced - R	11.17%	51.04%	8.60%
● Ninety One Opportunity - A	9.89%	55.40%	9.22%
● Old Mutual Balanced - A	11.84%	42.76%	7.38%
● M&G Balanced - A	13.54%	48.23%	8.19%
● PSG Balanced - A	15.06%	60.43%	9.91%
● Sanlam Balanced - A	12.23%	34.14%	6.05%
● STANLIB Multi-Strategy Growth B1	11.87%	43.64%	7.51%

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**INDUSTRY COMPARISON - 3 YEAR (02/04/2021 TO 29/03/2024, WEEKLY RISK)**

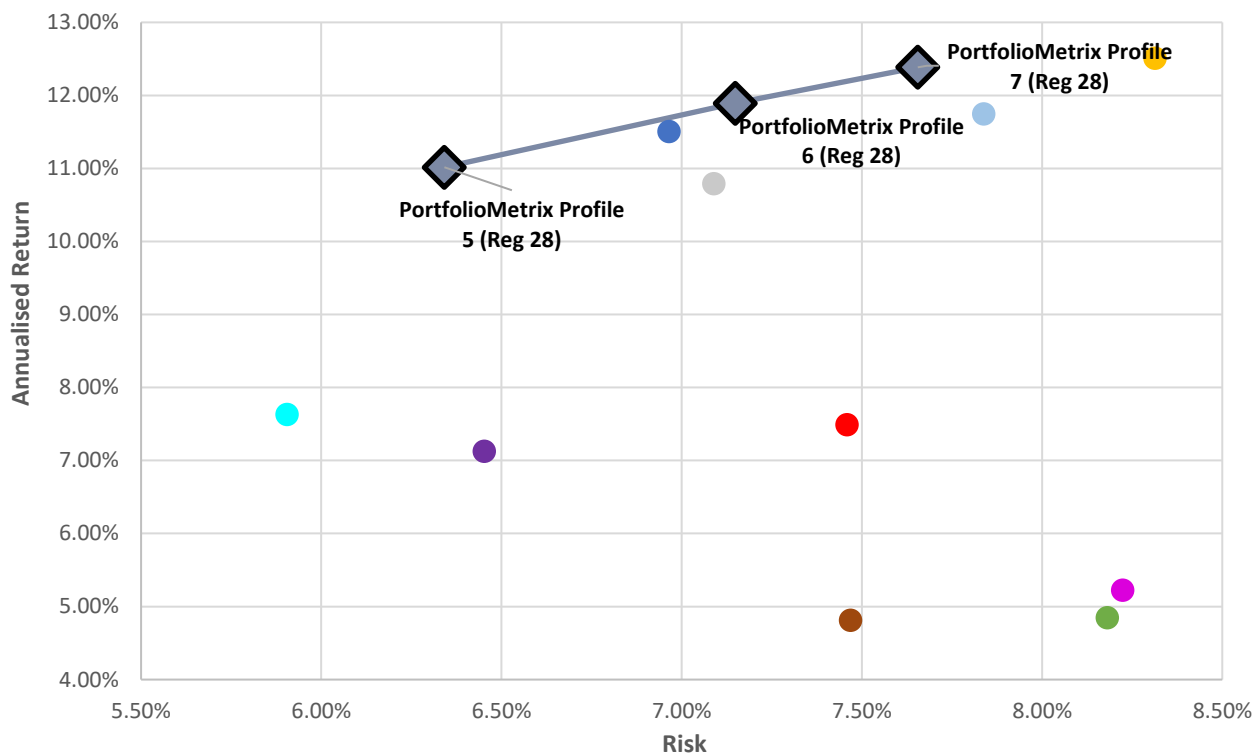


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetrix Profile 7 (Reg 28)</b>	9.61%	34.98%	10.52%
<b>PortfolioMetrix Profile 6 (Reg 28)</b>	8.93%	33.97%	10.24%
<b>PortfolioMetrix Profile 5 (Reg 28)</b>	7.97%	31.91%	9.67%
● Allan Gray Balanced - A	7.89%	36.48%	10.92%
● Coronation Balanced Plus - A	10.35%	28.91%	8.83%
● Discovery Balanced - A	9.58%	20.35%	6.37%
● Foord Balanced - R	9.01%	28.38%	8.68%
● Ninety One Opportunity - A	8.79%	34.13%	10.28%
● Old Mutual Balanced - A	8.64%	24.88%	7.69%
● M&G Balanced - A	9.31%	32.37%	9.80%
● PSG Balanced - A	10.24%	48.39%	14.06%
● Sanlam Balanced - A	9.08%	22.92%	7.12%
● STANLIB Multi-Strategy Growth B1	9.56%	20.75%	6.49%

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**INDUSTRY COMPARISON - 1 YEAR (31/03/2023 TO 29/03/2024, DAILY RISK)**

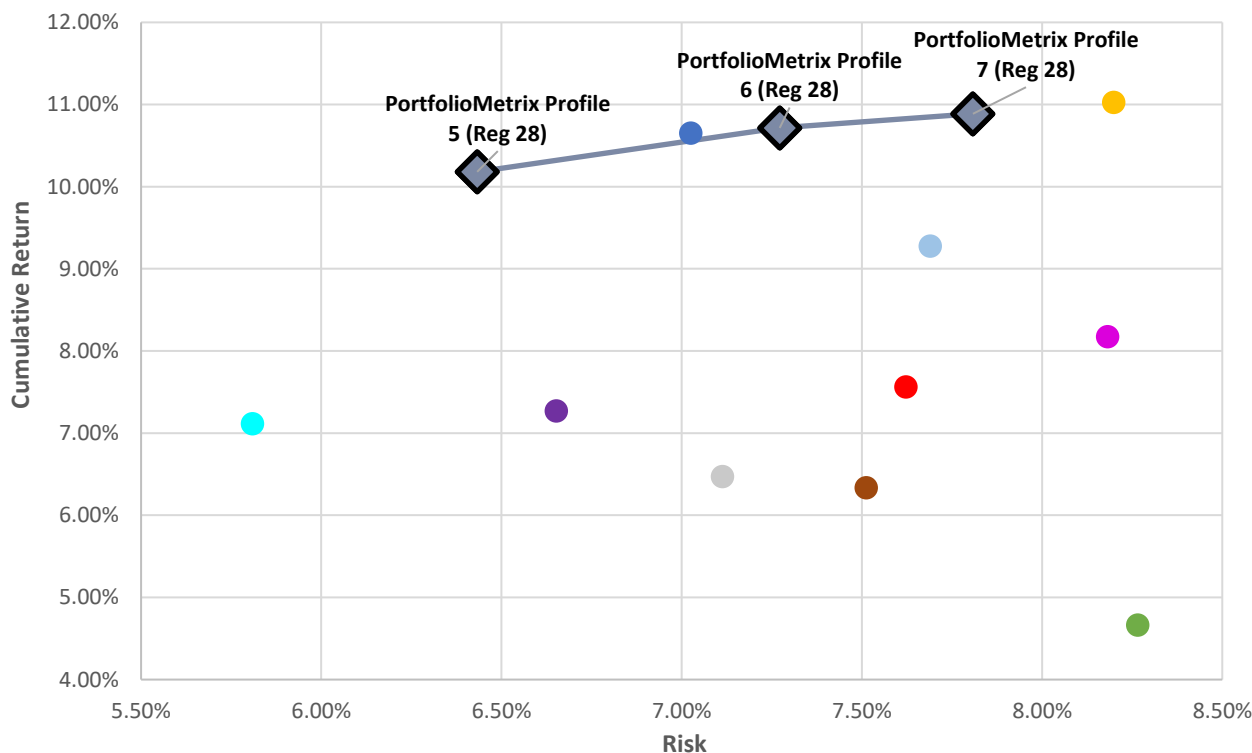


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetrix Profile 7 (Reg 28)</b>	<b>7.65%</b>	<b>12.38%</b>	<b>12.38%</b>
<b>PortfolioMetrix Profile 6 (Reg 28)</b>	<b>7.15%</b>	<b>11.89%</b>	<b>11.89%</b>
<b>PortfolioMetrix Profile 5 (Reg 28)</b>	<b>6.34%</b>	<b>11.02%</b>	<b>11.02%</b>
● Allan Gray Balanced - A	7.09%	10.80%	10.80%
● Coronation Balanced Plus - A	8.31%	12.51%	12.51%
● Discovery Balanced - A	8.22%	5.23%	5.23%
● Foord Balanced - R	7.47%	4.81%	4.81%
● Ninety One Opportunity - A	7.84%	11.75%	11.75%
● Old Mutual Balanced - A	6.45%	7.13%	7.13%
● M&G Balanced - A	7.46%	7.49%	7.49%
● PSG Balanced - A	8.18%	4.85%	4.85%
● Sanlam Balanced - A	5.90%	7.63%	7.63%
● STANLIB Multi-Strategy Growth B1	6.96%	11.51%	11.51%

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**INDUSTRY COMPARISON - 6 MONTHS (29/09/2023 TO 29/03/2024, DAILY RISK)**

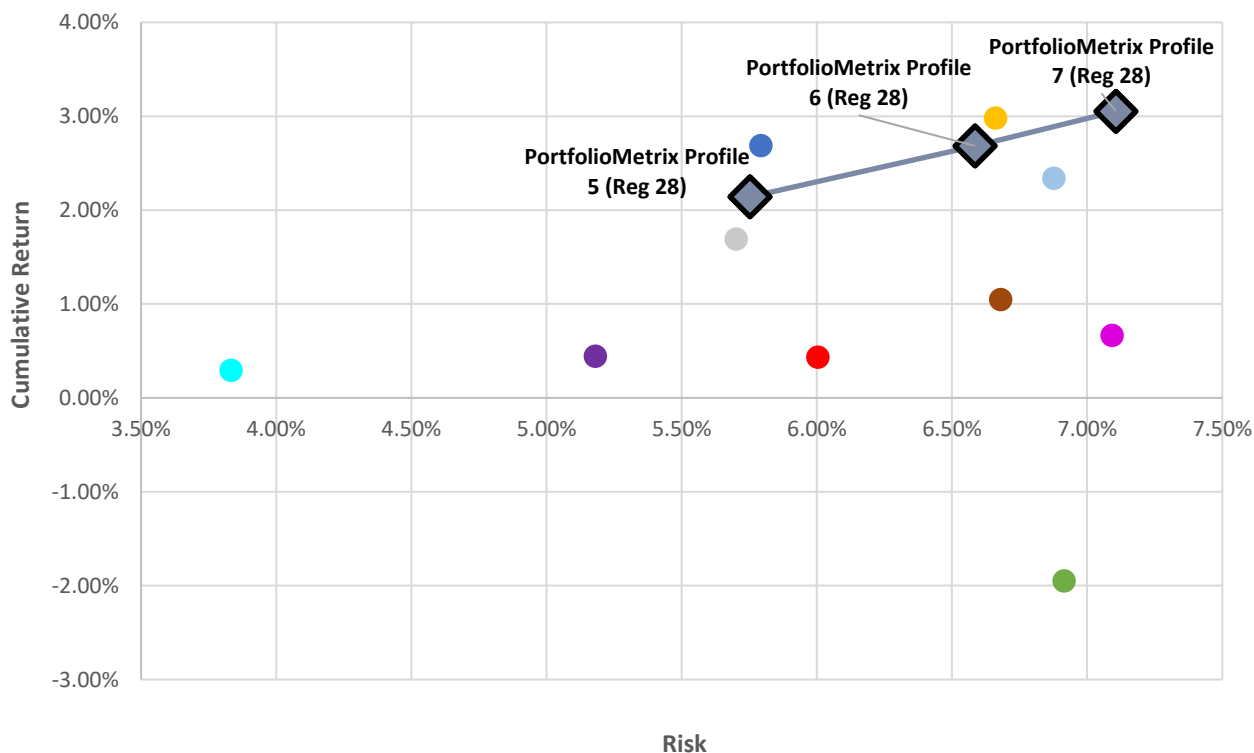


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetric Profile 7 (Reg 28)</b>	<b>7.81%</b>	<b>10.89%</b>	-
<b>PortfolioMetric Profile 6 (Reg 28)</b>	<b>7.27%</b>	<b>10.71%</b>	-
<b>PortfolioMetric Profile 5 (Reg 28)</b>	<b>6.43%</b>	<b>10.18%</b>	-
● Allan Gray Balanced - A	7.11%	6.47%	-
● Coronation Balanced Plus - A	8.20%	11.03%	-
● Discovery Balanced - A	8.18%	8.18%	-
● Foord Balanced - R	7.51%	6.34%	-
● Ninety One Opportunity - A	7.69%	9.28%	-
● Old Mutual Balanced - A	6.65%	7.27%	-
● M&G Balanced - A	7.62%	7.57%	-
● PSG Balanced - A	8.26%	4.67%	-
● Sanlam Balanced - A	5.81%	7.12%	-
● STANLIB Multi-Strategy Growth B1	7.03%	10.65%	-

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**INDUSTRY COMPARISON - 3 MONTHS (29/12/2023 TO 29/03/2024, DAILY RISK)**

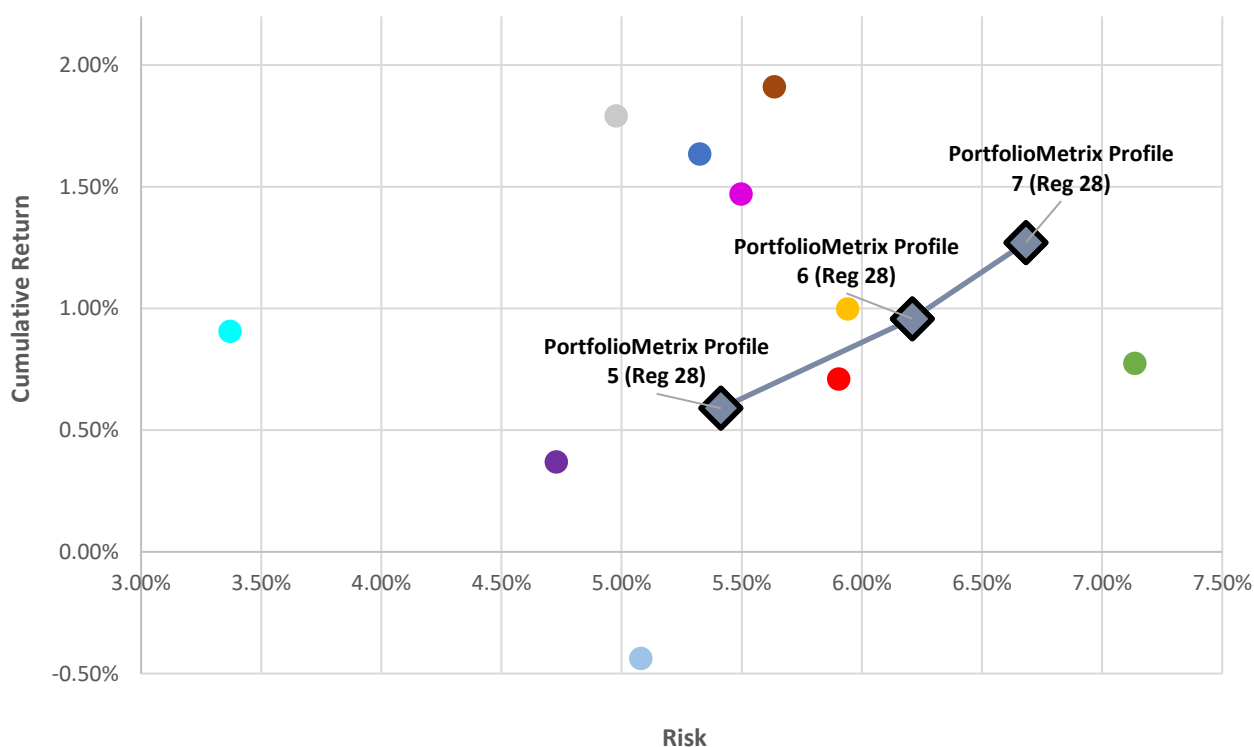


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetric Profile 7 (Reg 28)</b>	<b>7.11%</b>	<b>3.05%</b>	-
<b>PortfolioMetric Profile 6 (Reg 28)</b>	<b>6.59%</b>	<b>2.68%</b>	-
<b>PortfolioMetric Profile 5 (Reg 28)</b>	<b>5.75%</b>	<b>2.14%</b>	-
● Allan Gray Balanced - A	5.70%	1.69%	-
● Coronation Balanced Plus - A	6.66%	2.98%	-
● Discovery Balanced - A	7.09%	0.67%	-
● Foord Balanced - R	6.68%	1.05%	-
● Ninety One Opportunity - A	6.88%	2.34%	-
● Old Mutual Balanced - A	5.18%	0.44%	-
● M&G Balanced - A	6.00%	0.44%	-
● PSG Balanced - A	6.91%	-1.95%	-
● Sanlam Balanced - A	3.83%	0.30%	-
● STANLIB Multi-Strategy Growth B1	5.79%	2.69%	-

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**INDUSTRY COMPARISON - 1 MONTH (29/02/2024 TO 29/03/2024, DAILY RISK)**



Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetric Profile 7 (Reg 28)</b>	<b>6.68%</b>	<b>1.27%</b>	-
<b>PortfolioMetric Profile 6 (Reg 28)</b>	<b>6.21%</b>	<b>0.96%</b>	-
<b>PortfolioMetric Profile 5 (Reg 28)</b>	<b>5.41%</b>	<b>0.59%</b>	-
● Allan Gray Balanced - A	4.98%	1.79%	-
● Coronation Balanced Plus - A	5.94%	1.00%	-
● Discovery Balanced - A	5.50%	1.47%	-
● Foord Balanced - R	5.63%	1.91%	-
● Ninety One Opportunity - A	5.08%	-0.44%	-
● Old Mutual Balanced - A	4.73%	0.37%	-
● M&G Balanced - A	5.90%	0.71%	-
● PSG Balanced - A	7.14%	0.78%	-
● Sanlam Balanced - A	3.37%	0.91%	-
● STANLIB Multi-Strategy Growth B1	5.33%	1.64%	-

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