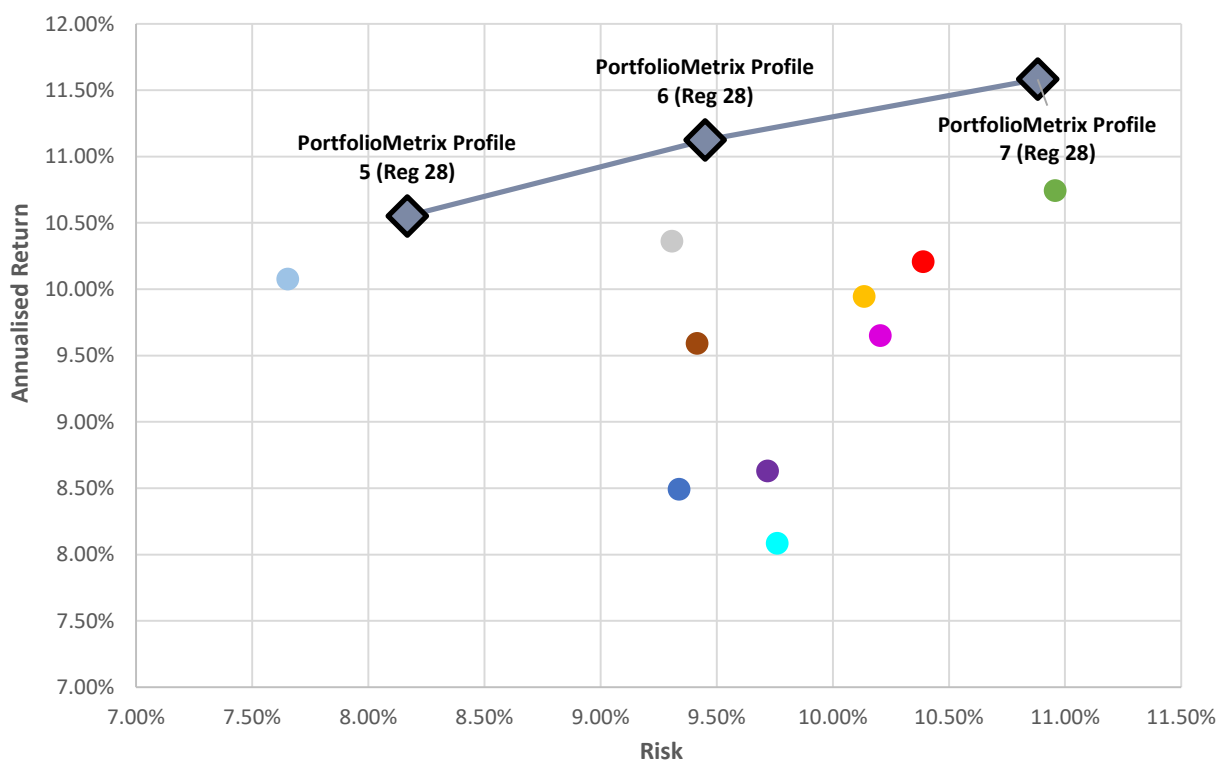


**INDUSTRY COMPARISON - INCEPTION (03/12/2010 TO 28/04/2023, WEEKLY RISK)**

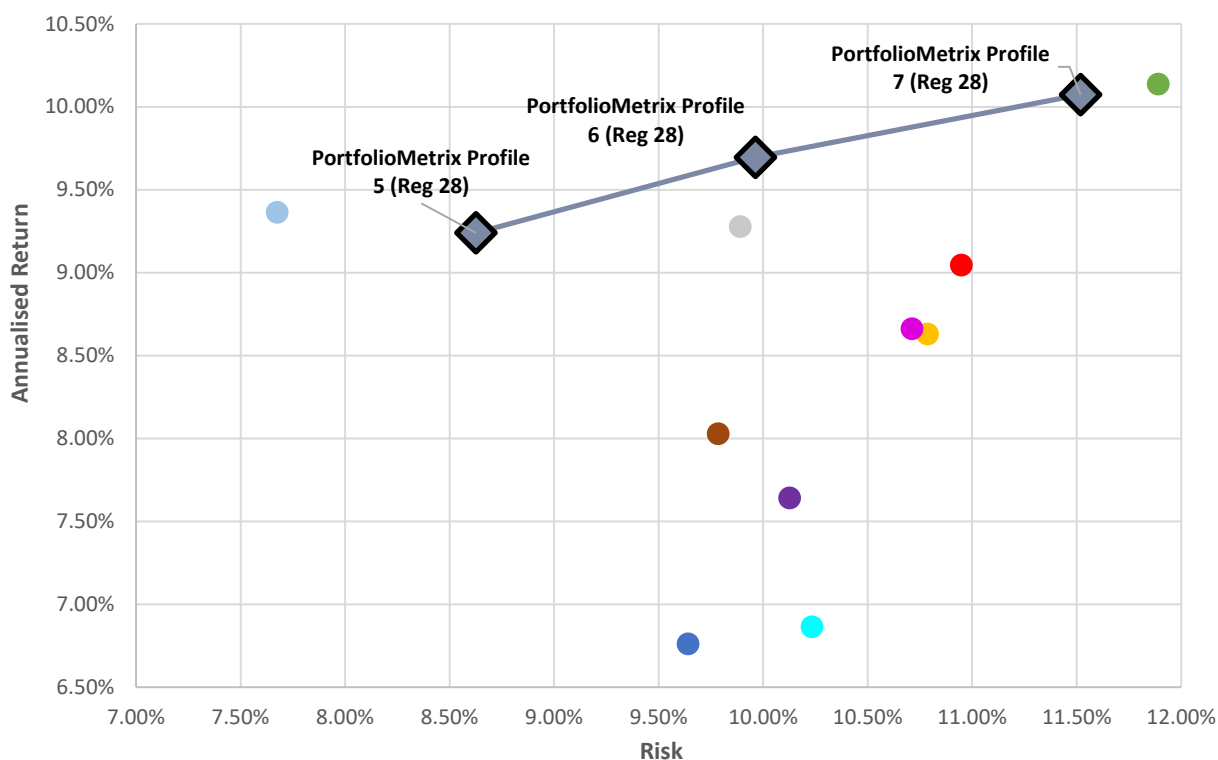


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetrix Profile 7 (Reg 28)</b>	10.88%	291.84%	11.58%
<b>PortfolioMetrix Profile 6 (Reg 28)</b>	9.45%	272.25%	11.12%
<b>PortfolioMetrix Profile 5 (Reg 28)</b>	8.17%	249.06%	10.55%
● Allan Gray Balanced - A	9.31%	241.66%	10.36%
● Coronation Balanced Plus - A	10.13%	225.94%	9.95%
● Discovery Balanced - A	10.20%	215.23%	9.65%
● Foord Balanced - R	9.42%	213.13%	9.59%
● Ninety One Managed - A	7.65%	230.81%	10.08%
● Old Mutual Balanced - A	9.72%	180.59%	8.63%
● M&G Balanced - A	10.39%	235.77%	10.21%
● PSG Balanced - A	10.96%	256.74%	10.75%
● Sanlam Balanced - A	9.76%	163.55%	8.09%
● STANLIB Balanced - B1	9.34%	176.17%	8.49%

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**INDUSTRY COMPARISON - 10 YEAR (10/05/2013 TO 28/04/2023, WEEKLY RISK)**

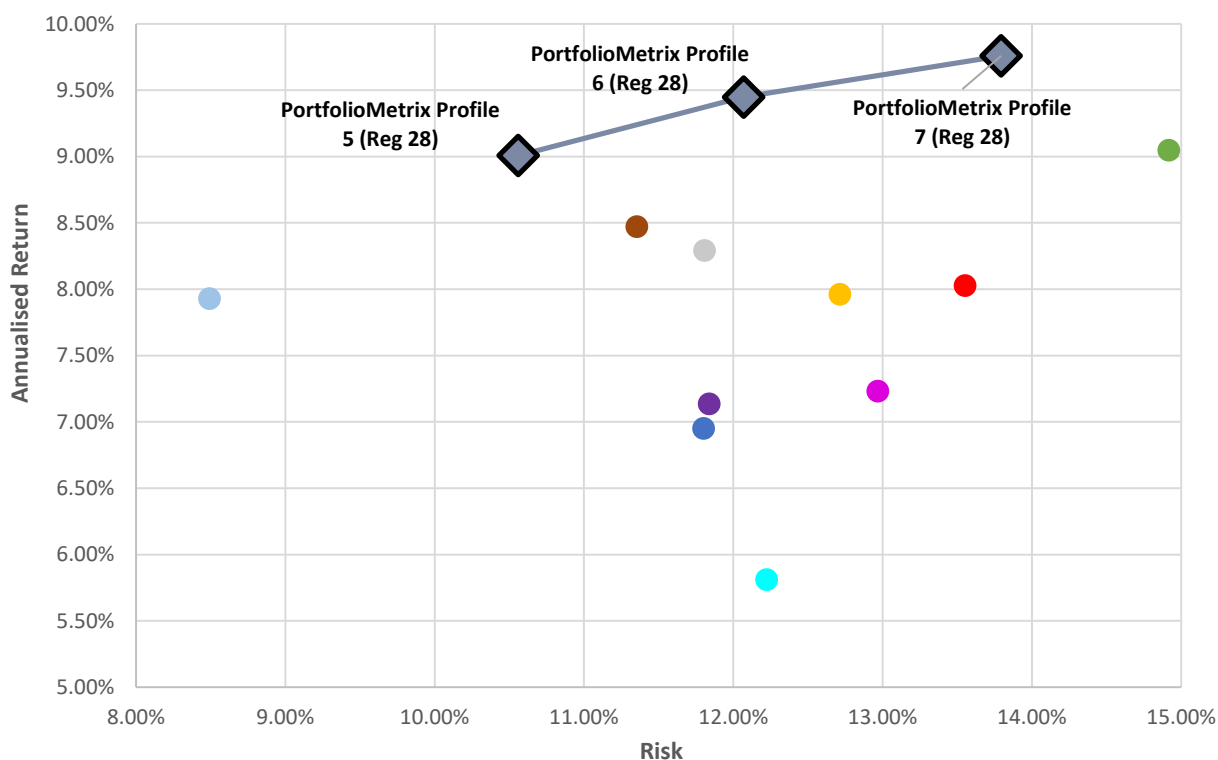


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetrix Profile 7 (Reg 28)</b>	<b>11.52%</b>	<b>161.11%</b>	<b>10.07%</b>
<b>PortfolioMetrix Profile 6 (Reg 28)</b>	<b>9.96%</b>	<b>152.27%</b>	<b>9.69%</b>
<b>PortfolioMetrix Profile 5 (Reg 28)</b>	<b>8.63%</b>	<b>141.99%</b>	<b>9.24%</b>
● Allan Gray Balanced - A	9.89%	142.84%	9.28%
● Coronation Balanced Plus - A	10.79%	128.82%	8.63%
● Discovery Balanced - A	10.71%	129.52%	8.66%
● Foord Balanced - R	9.78%	116.48%	8.03%
● Ninety One Managed - A	7.68%	144.77%	9.36%
● Old Mutual Balanced - A	10.13%	108.85%	7.64%
● M&G Balanced - A	10.95%	137.72%	9.05%
● PSG Balanced - A	11.89%	162.62%	10.14%
● Sanlam Balanced - A	10.23%	94.24%	6.86%
● STANLIB Balanced - B1	9.64%	92.38%	6.76%

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**INDUSTRY COMPARISON - 5 YEAR (04/05/2018 TO 28/04/2023, WEEKLY RISK)**

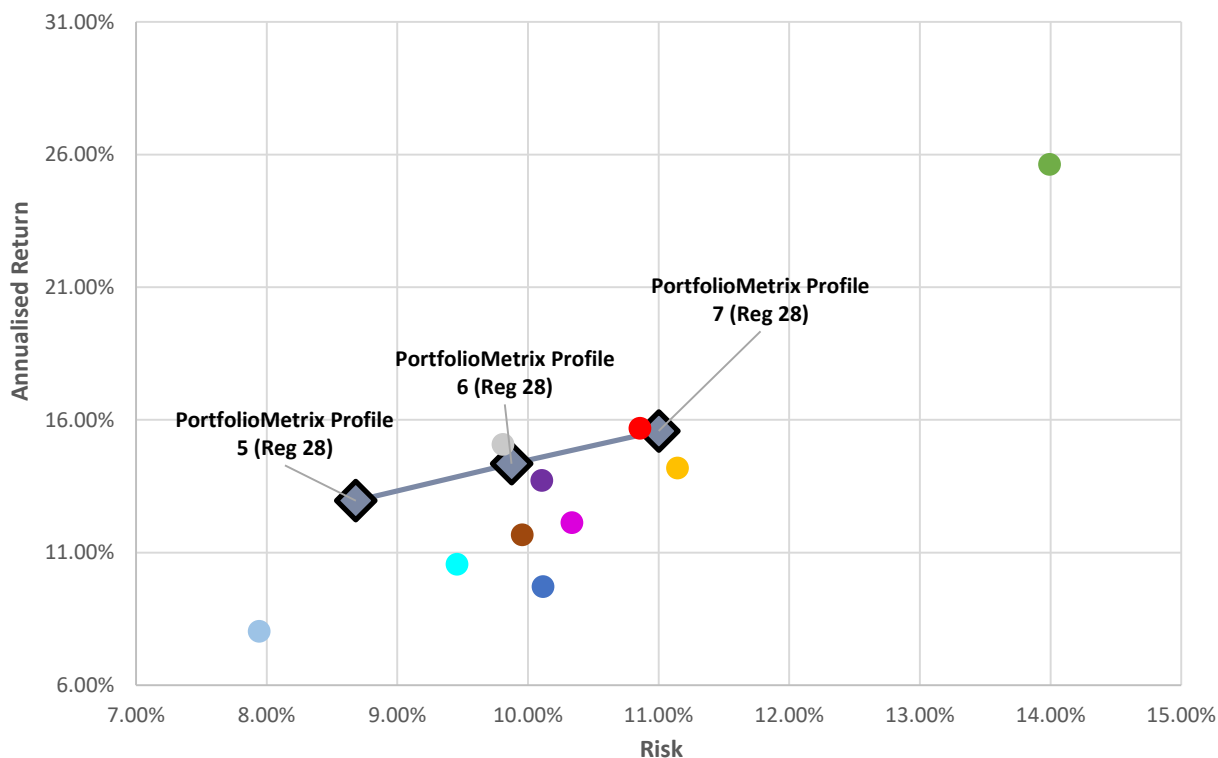


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetrix Profile 7 (Reg 28)</b>	13.79%	59.29%	9.76%
<b>PortfolioMetrix Profile 6 (Reg 28)</b>	12.07%	57.05%	9.45%
<b>PortfolioMetrix Profile 5 (Reg 28)</b>	10.56%	53.92%	9.01%
● Allan Gray Balanced - A	11.81%	48.94%	8.29%
● Coronation Balanced Plus - A	12.71%	46.68%	7.96%
● Discovery Balanced - A	12.97%	41.79%	7.23%
● Foord Balanced - R	11.35%	50.17%	8.47%
● Ninety One Managed - A	8.49%	46.45%	7.93%
● Old Mutual Balanced - A	11.84%	41.15%	7.14%
● M&G Balanced - A	13.55%	47.13%	8.03%
● PSG Balanced - A	14.92%	54.20%	9.05%
● Sanlam Balanced - A	12.22%	32.64%	5.81%
● STANLIB Balanced - B1	11.80%	39.94%	6.95%

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**INDUSTRY COMPARISON - 3 YEAR (01/05/2020 TO 28/04/2023, WEEKLY RISK)**

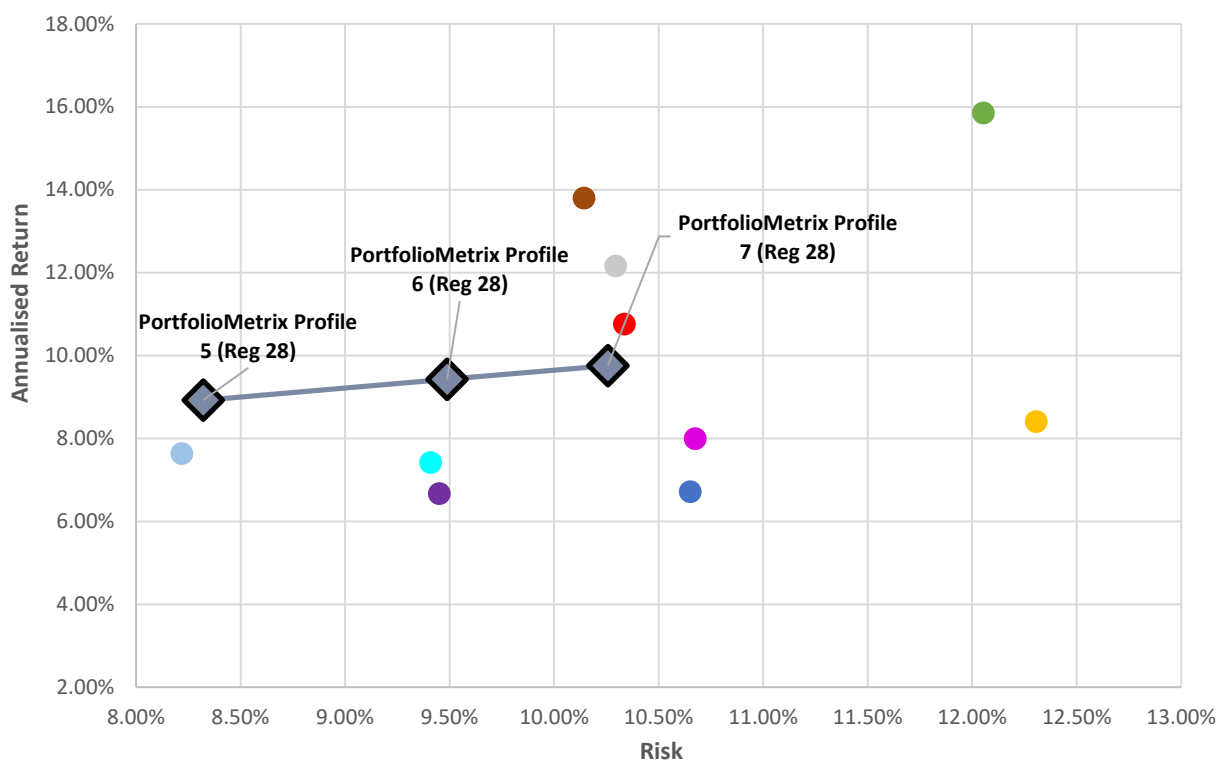


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetrix Profile 7 (Reg 28)</b>	11.00%	54.41%	15.58%
<b>PortfolioMetrix Profile 6 (Reg 28)</b>	9.87%	49.51%	14.35%
<b>PortfolioMetrix Profile 5 (Reg 28)</b>	8.68%	44.11%	12.95%
● Allan Gray Balanced - A	9.81%	52.40%	15.08%
● Coronation Balanced Plus - A	11.14%	48.89%	14.19%
● Discovery Balanced - A	10.33%	40.98%	12.13%
● Foord Balanced - R	9.96%	39.23%	11.66%
● Ninety One Managed - A	7.94%	26.11%	8.04%
● Old Mutual Balanced - A	10.10%	47.06%	13.72%
● M&G Balanced - A	10.86%	54.84%	15.69%
● PSG Balanced - A	13.99%	98.28%	25.63%
● Sanlam Balanced - A	9.45%	35.15%	10.56%
● STANLIB Balanced - B1	10.11%	32.11%	9.73%

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**INDUSTRY COMPARISON - 1 YEAR (29/04/2022 TO 28/04/2023, DAILY RISK)**

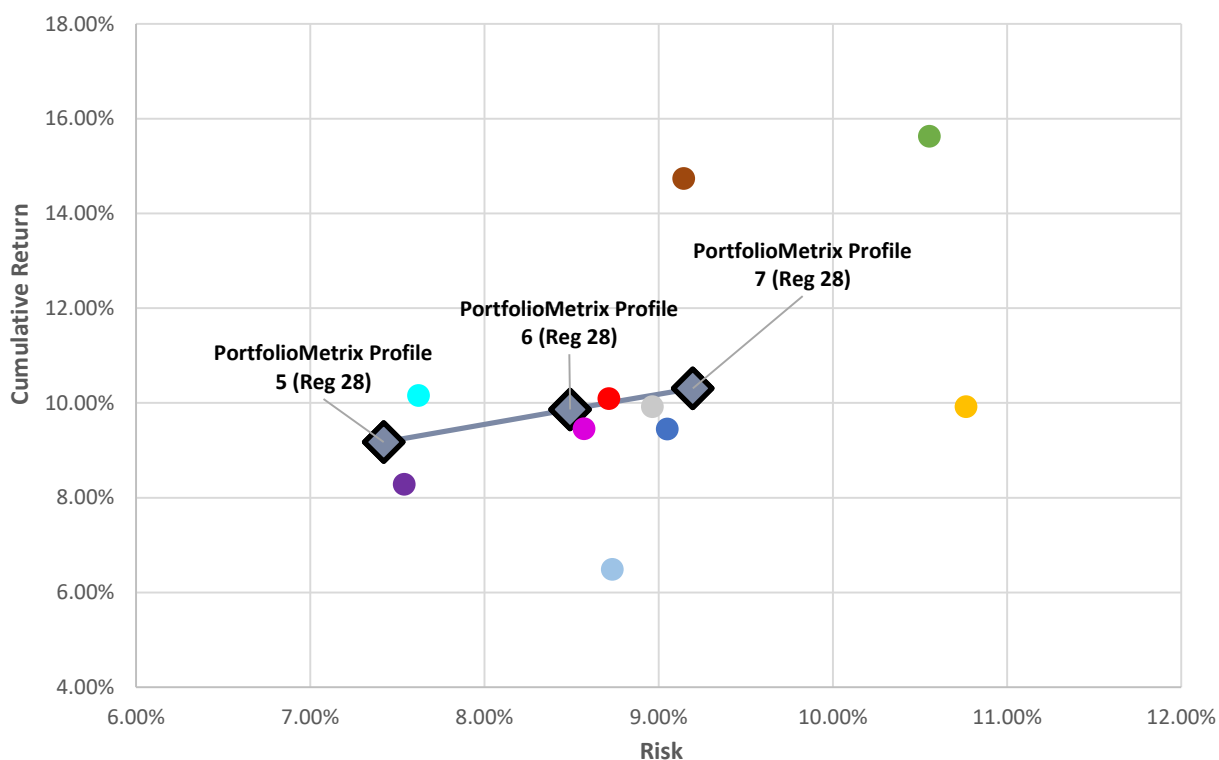


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetrix Profile 7 (Reg 28)</b>	<b>10.26%</b>	<b>9.76%</b>	<b>9.76%</b>
<b>PortfolioMetrix Profile 6 (Reg 28)</b>	<b>9.49%</b>	<b>9.43%</b>	<b>9.43%</b>
<b>PortfolioMetrix Profile 5 (Reg 28)</b>	<b>8.32%</b>	<b>8.92%</b>	<b>8.92%</b>
● Allan Gray Balanced - A	10.29%	12.16%	12.16%
● Coronation Balanced Plus - A	12.31%	8.41%	8.41%
● Discovery Balanced - A	10.67%	8.00%	8.00%
● Foord Balanced - R	10.14%	13.80%	13.80%
● Ninety One Managed - A	8.22%	7.64%	7.64%
● Old Mutual Balanced - A	9.45%	6.67%	6.67%
● M&G Balanced - A	10.34%	10.76%	10.76%
● PSG Balanced - A	12.05%	15.85%	15.85%
● Sanlam Balanced - A	9.41%	7.42%	7.42%
● STANLIB Balanced - B1	10.65%	6.72%	6.72%

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**INDUSTRY COMPARISON - 6 MONTHS (31/10/2022 TO 28/04/2023, DAILY RISK)**

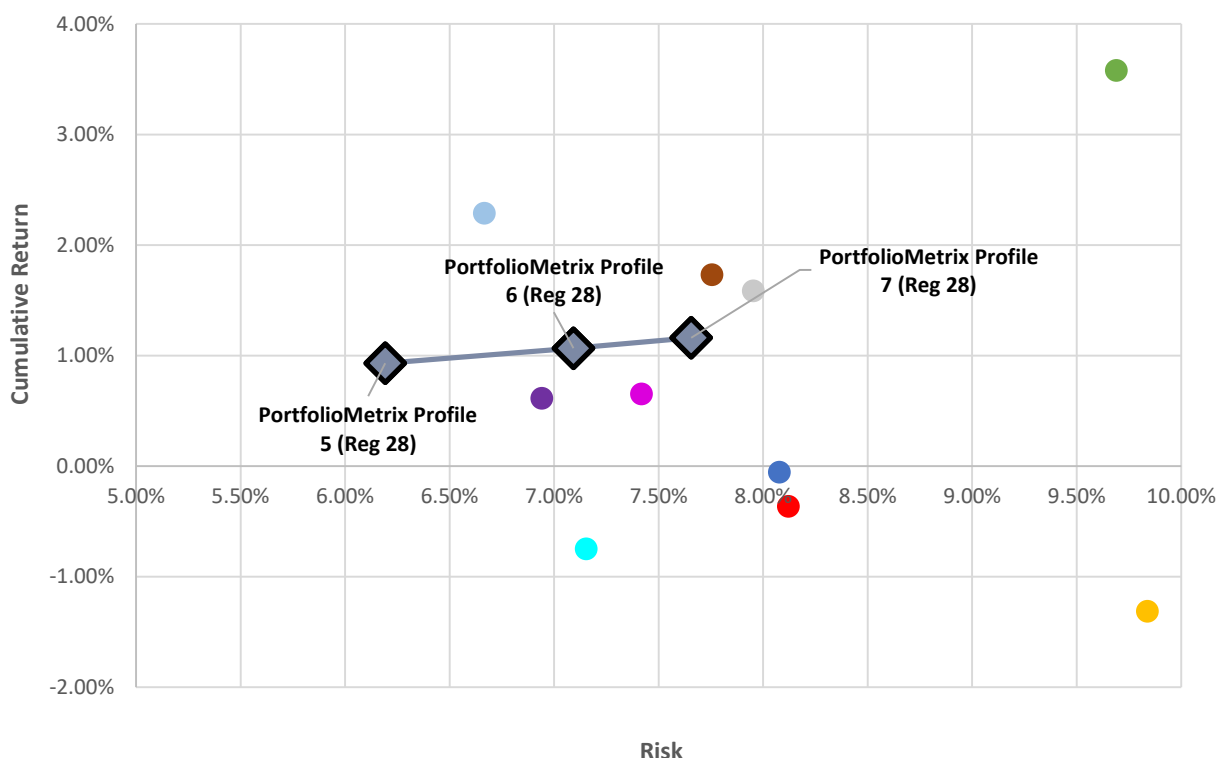


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetric Profile 7 (Reg 28)</b>	<b>9.20%</b>	<b>10.31%</b>	-
<b>PortfolioMetric Profile 6 (Reg 28)</b>	<b>8.49%</b>	<b>9.86%</b>	-
<b>PortfolioMetric Profile 5 (Reg 28)</b>	<b>7.42%</b>	<b>9.17%</b>	-
● Allan Gray Balanced - A	8.96%	9.93%	-
● Coronation Balanced Plus - A	10.76%	9.92%	-
● Discovery Balanced - A	8.57%	9.46%	-
● Foord Balanced - R	9.14%	14.74%	-
● Ninety One Managed - A	8.73%	6.49%	-
● Old Mutual Balanced - A	7.54%	8.29%	-
● M&G Balanced - A	8.71%	10.09%	-
● PSG Balanced - A	10.55%	15.63%	-
● Sanlam Balanced - A	7.62%	10.16%	-
● STANLIB Balanced - B1	9.05%	9.45%	-

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**INDUSTRY COMPARISON - 3 MONTHS (31/01/2023 TO 28/04/2023, DAILY RISK)**

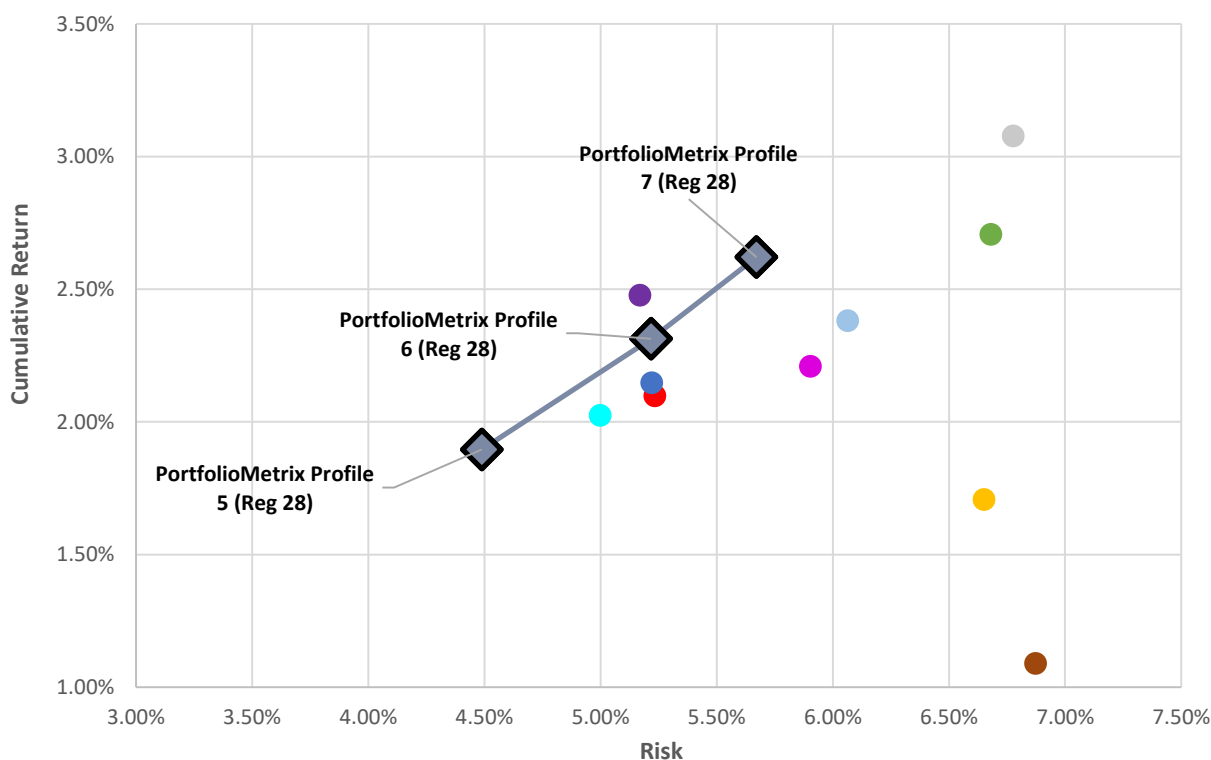


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetrix Profile 7 (Reg 28)</b>	7.66%	1.16%	-
<b>PortfolioMetrix Profile 6 (Reg 28)</b>	7.09%	1.07%	-
<b>PortfolioMetrix Profile 5 (Reg 28)</b>	6.19%	0.93%	-
● Allan Gray Balanced - A	7.95%	1.59%	-
● Coronation Balanced Plus - A	9.84%	-1.31%	-
● Discovery Balanced - A	7.42%	0.65%	-
● Foord Balanced - R	7.75%	1.73%	-
● Ninety One Managed - A	6.67%	2.29%	-
● Old Mutual Balanced - A	6.94%	0.61%	-
● M&G Balanced - A	8.12%	-0.36%	-
● PSG Balanced - A	9.69%	3.58%	-
● Sanlam Balanced - A	7.15%	-0.75%	-
● STANLIB Balanced - B1	8.08%	-0.05%	-

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**INDUSTRY COMPARISON - 1 MONTH (31/03/2023 TO 28/04/2023, DAILY RISK)**



Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetrix Profile 7 (Reg 28)</b>	5.67%	2.62%	-
<b>PortfolioMetrix Profile 6 (Reg 28)</b>	5.22%	2.31%	-
<b>PortfolioMetrix Profile 5 (Reg 28)</b>	4.49%	1.90%	-
● Allan Gray Balanced - A	6.78%	3.08%	-
● Coronation Balanced Plus - A	6.65%	1.71%	-
● Discovery Balanced - A	5.90%	2.21%	-
● Foord Balanced - R	6.87%	1.09%	-
● Ninety One Managed - A	6.06%	2.38%	-
● Old Mutual Balanced - A	5.17%	2.48%	-
● M&G Balanced - A	5.23%	2.10%	-
● PSG Balanced - A	6.68%	2.71%	-
● Sanlam Balanced - A	5.00%	2.02%	-
● STANLIB Balanced - B1	5.22%	2.15%	-

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