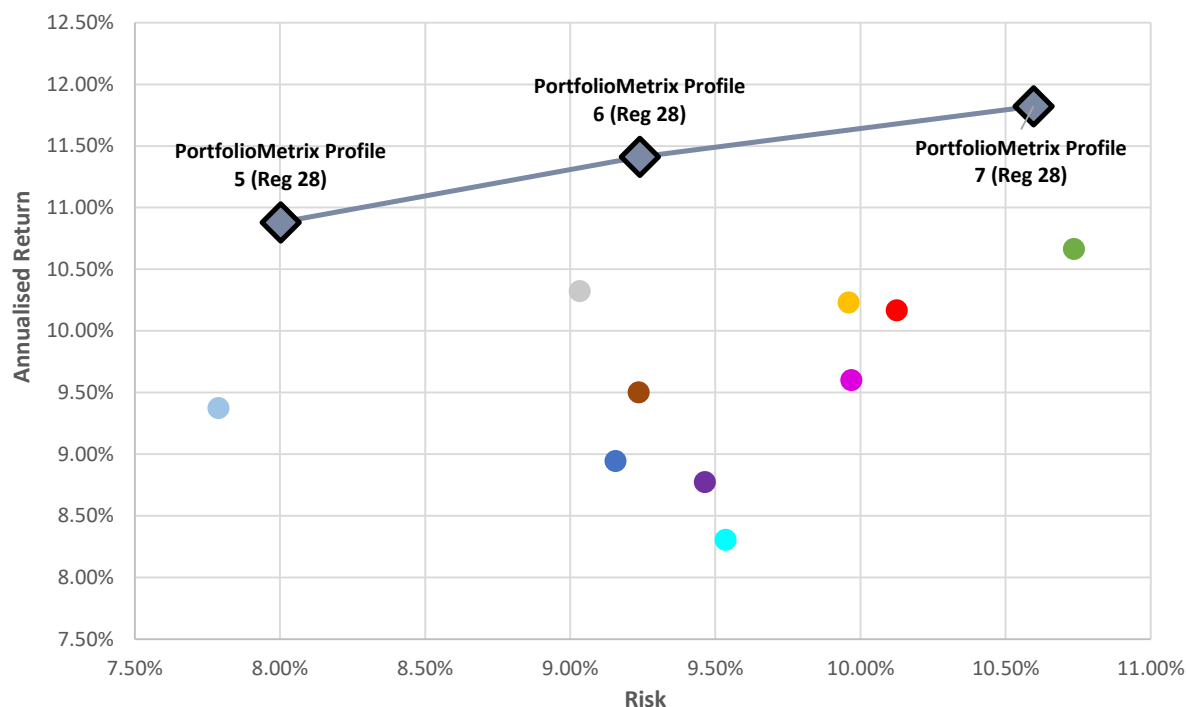


**INDUSTRY COMPARISON - INCEPTION (03/12/2010 TO 25/10/2024, WEEKLY RISK)**

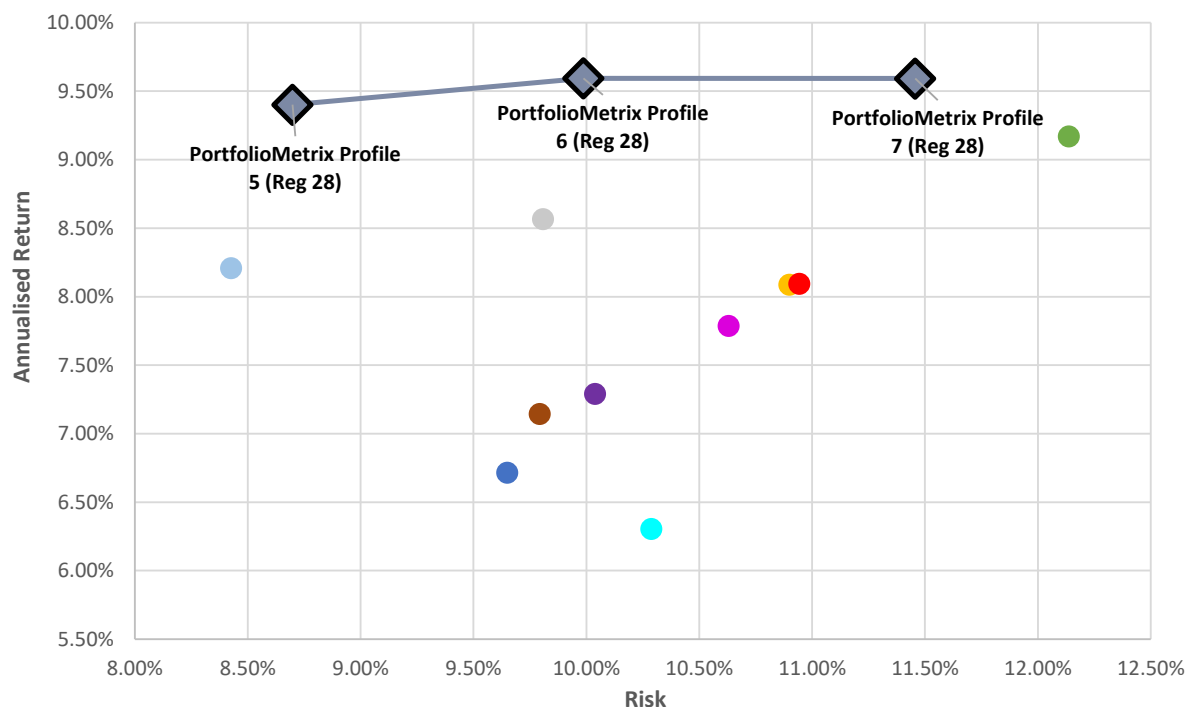


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetrix Profile 7 (Reg 28)</b>	<b>10.60%</b>	<b>376.94%</b>	<b>11.82%</b>
<b>PortfolioMetrix Profile 6 (Reg 28)</b>	<b>9.24%</b>	<b>353.06%</b>	<b>11.41%</b>
<b>PortfolioMetrix Profile 5 (Reg 28)</b>	<b>8.00%</b>	<b>323.81%</b>	<b>10.88%</b>
● Allan Gray Balanced - A	9.03%	295.03%	10.33%
● Coronation Balanced Plus - A	9.96%	290.46%	10.23%
● Discovery Balanced - A	9.97%	260.41%	9.60%
● Foord Balanced - R	9.24%	255.72%	9.50%
● Ninety One Opportunity - A	7.79%	250.10%	9.38%
● Old Mutual Balanced - A	9.46%	224.19%	8.78%
● M&G Balanced - A	10.12%	287.27%	10.17%
● PSG Balanced - A	10.74%	312.50%	10.67%
● Sanlam Balanced - A	9.53%	205.20%	8.31%
● STANLIB Multi-Strategy Growth B1	9.16%	231.32%	8.95%

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**INDUSTRY COMPARISON - 10 YEAR (07/11/2014 TO 25/10/2024, WEEKLY RISK)**

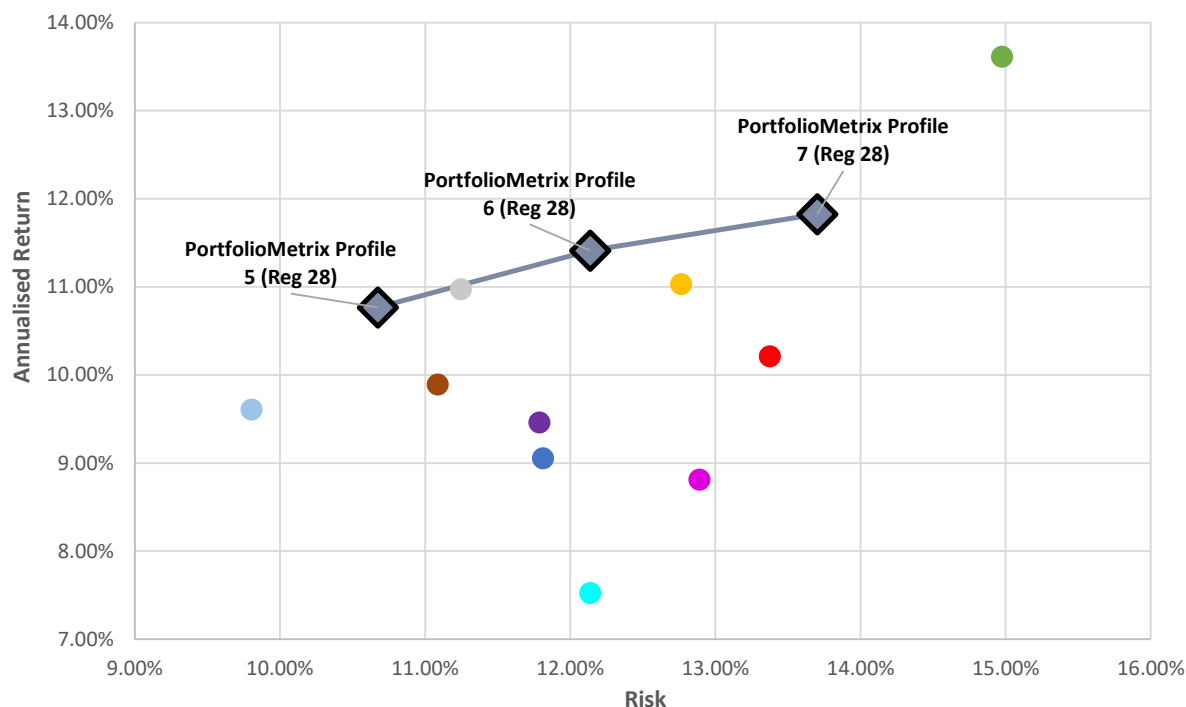


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetrix Profile 7 (Reg 28)</b>	<b>11.46%</b>	<b>149.93%</b>	<b>9.59%</b>
<b>PortfolioMetrix Profile 6 (Reg 28)</b>	<b>9.99%</b>	<b>149.95%</b>	<b>9.59%</b>
<b>PortfolioMetrix Profile 5 (Reg 28)</b>	<b>8.70%</b>	<b>145.60%</b>	<b>9.40%</b>
● Allan Gray Balanced - A	9.81%	127.49%	8.57%
● Coronation Balanced Plus - A	10.90%	117.68%	8.09%
● Discovery Balanced - A	10.63%	111.68%	7.79%
● Foord Balanced - R	9.79%	99.38%	7.14%
● Ninety One Opportunity - A	8.43%	120.11%	8.21%
● Old Mutual Balanced - A	10.04%	102.14%	7.29%
● M&G Balanced - A	10.94%	117.83%	8.10%
● PSG Balanced - A	12.14%	140.50%	9.17%
● Sanlam Balanced - A	10.29%	84.31%	6.31%
● STANLIB Multi-Strategy Growth B1	9.65%	91.58%	6.72%

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**INDUSTRY COMPARISON - 5 YEAR (01/11/2019 TO 25/10/2024, WEEKLY RISK)**

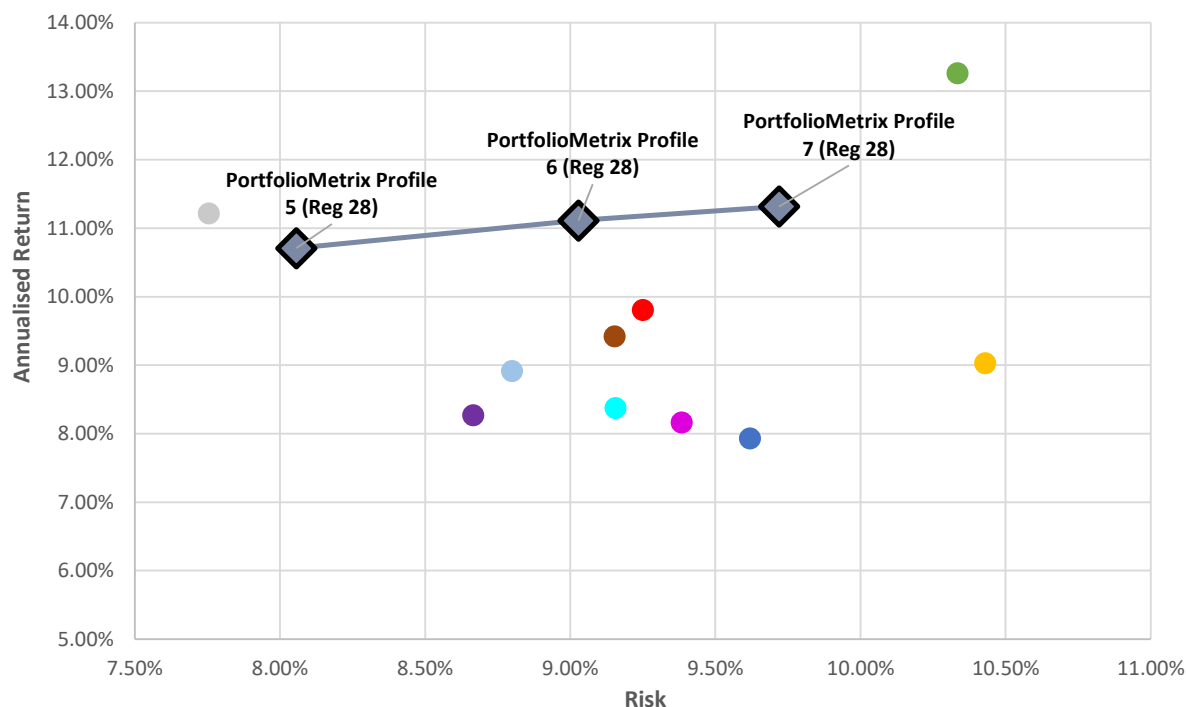


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetrix Profile 7 (Reg 28)</b>	<b>13.70%</b>	<b>74.87%</b>	<b>11.83%</b>
<b>PortfolioMetrix Profile 6 (Reg 28)</b>	<b>12.14%</b>	<b>71.66%</b>	<b>11.41%</b>
<b>PortfolioMetrix Profile 5 (Reg 28)</b>	<b>10.67%</b>	<b>66.75%</b>	<b>10.77%</b>
● Allan Gray Balanced - A	11.25%	68.33%	10.98%
● Coronation Balanced Plus - A	12.76%	68.78%	11.04%
● Discovery Balanced - A	12.89%	52.56%	8.82%
● Foord Balanced - R	11.09%	60.26%	9.89%
● Ninety One Opportunity - A	9.80%	58.21%	9.61%
● Old Mutual Balanced - A	11.79%	57.16%	9.46%
● M&G Balanced - A	13.37%	62.62%	10.21%
● PSG Balanced - A	14.97%	89.33%	13.62%
● Sanlam Balanced - A	12.14%	43.73%	7.52%
● STANLIB Multi-Strategy Growth B1	11.81%	54.26%	9.06%

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**INDUSTRY COMPARISON - 3 YEAR (29/10/2021 TO 25/10/2024, WEEKLY RISK)**

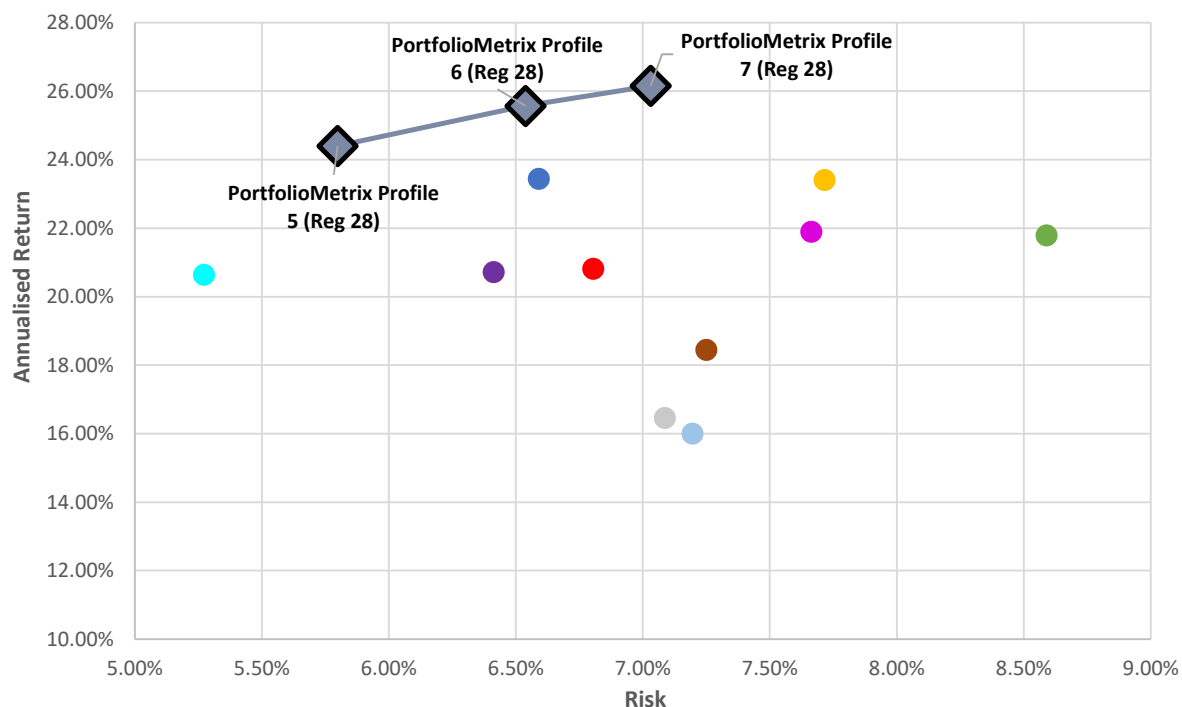


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetrix Profile 7 (Reg 28)</b>	<b>9.72%</b>	<b>37.93%</b>	<b>11.32%</b>
<b>PortfolioMetrix Profile 6 (Reg 28)</b>	<b>9.03%</b>	<b>37.18%</b>	<b>11.11%</b>
<b>PortfolioMetrix Profile 5 (Reg 28)</b>	<b>8.06%</b>	<b>35.69%</b>	<b>10.71%</b>
● Allan Gray Balanced - A	7.75%	37.58%	11.22%
● Coronation Balanced Plus - A	10.43%	29.61%	9.03%
● Discovery Balanced - A	9.38%	26.55%	8.16%
● Foord Balanced - R	9.15%	31.01%	9.42%
● Ninety One Opportunity - A	8.80%	29.21%	8.92%
● Old Mutual Balanced - A	8.67%	26.93%	8.27%
● M&G Balanced - A	9.25%	32.41%	9.81%
● PSG Balanced - A	10.33%	45.31%	13.27%
● Sanlam Balanced - A	9.16%	27.30%	8.38%
● STANLIB Multi-Strategy Growth B1	9.62%	25.74%	7.93%

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INDUSTRY COMPARISON - 1 YEAR (31/10/2023 TO 31/10/2024, DAILY RISK)

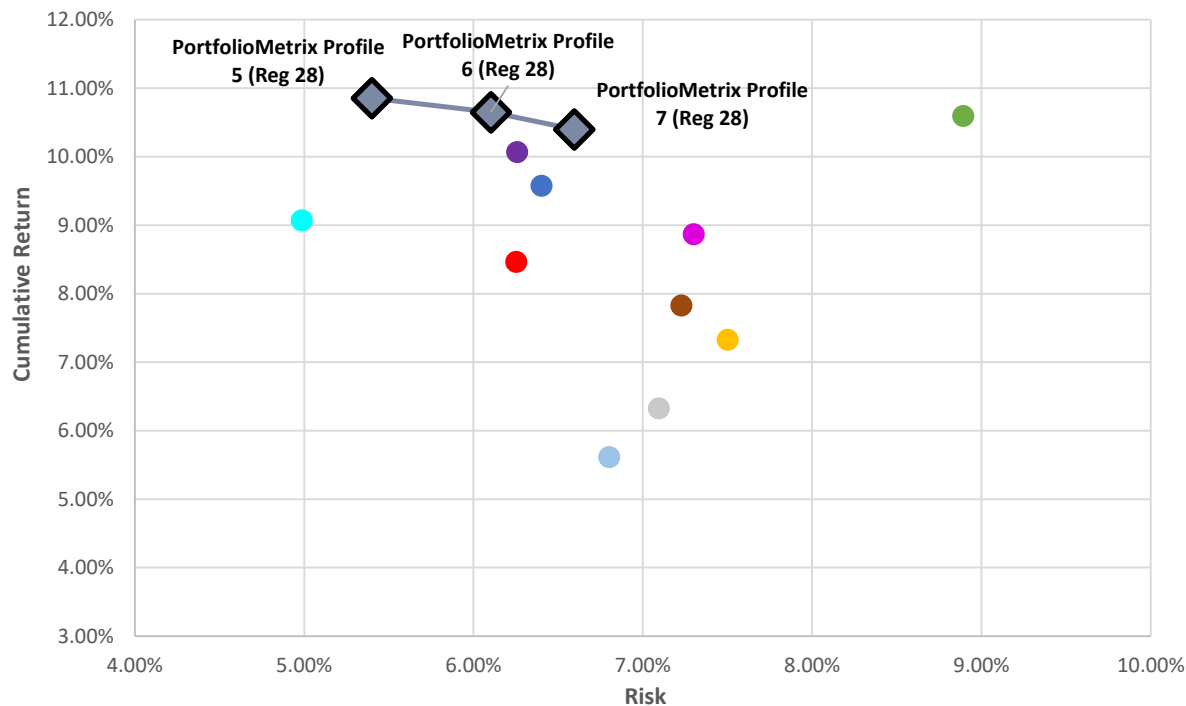


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetrix Profile 7 (Reg 28)</b>	<b>7.03%</b>	<b>26.15%</b>	<b>26.15%</b>
<b>PortfolioMetrix Profile 6 (Reg 28)</b>	<b>6.54%</b>	<b>25.57%</b>	<b>25.57%</b>
<b>PortfolioMetrix Profile 5 (Reg 28)</b>	<b>5.80%</b>	<b>24.40%</b>	<b>24.40%</b>
● Allan Gray Balanced - A	7.09%	16.46%	16.46%
● Coronation Balanced Plus - A	7.72%	23.41%	23.41%
● Discovery Balanced - A	7.66%	21.91%	21.91%
● Foord Balanced - R	7.25%	18.45%	18.45%
● Ninety One Opportunity - A	7.19%	16.01%	16.01%
● Old Mutual Balanced - A	6.41%	20.72%	20.72%
● M&G Balanced - A	6.80%	20.82%	20.82%
● PSG Balanced - A	8.59%	21.80%	21.80%
● Sanlam Balanced - A	5.27%	20.64%	20.64%
● STANLIB Multi-Strategy Growth B1	6.59%	23.45%	23.45%

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**INDUSTRY COMPARISON - 6 MONTHS (30/04/2024 TO 31/10/2024, DAILY RISK)**

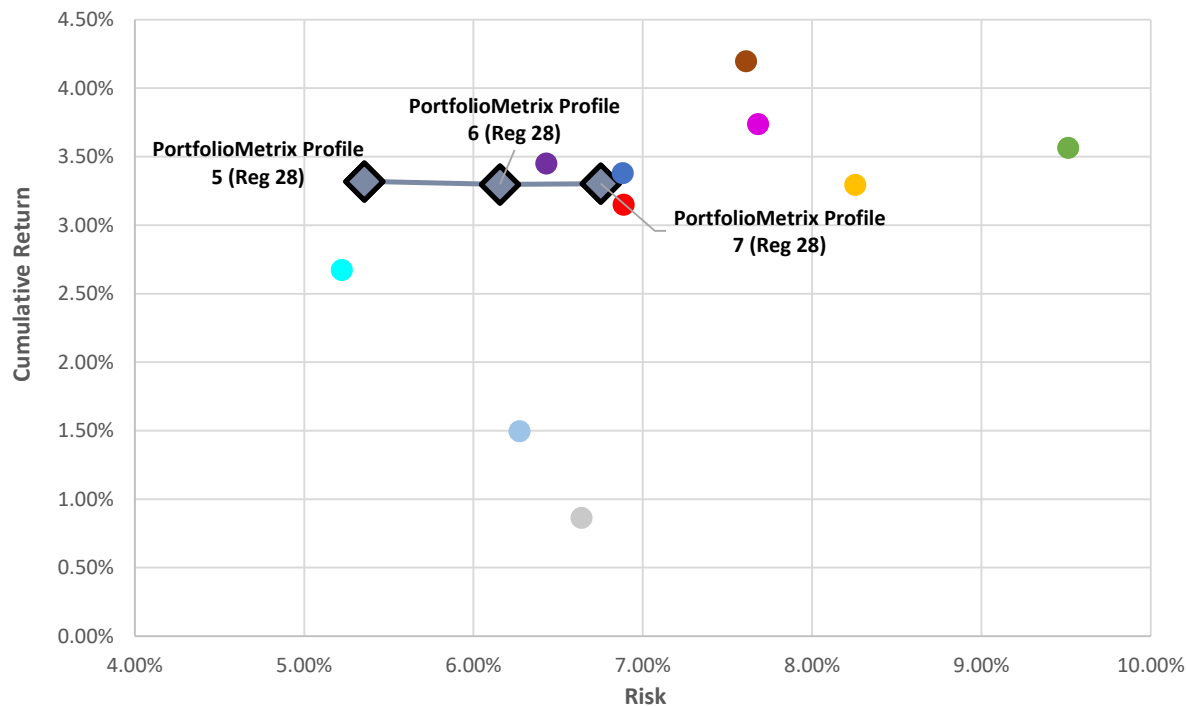


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetric Profile 7 (Reg 28)</b>	<b>6.60%</b>	<b>10.40%</b>	-
<b>PortfolioMetric Profile 6 (Reg 28)</b>	<b>6.10%</b>	<b>10.65%</b>	-
<b>PortfolioMetric Profile 5 (Reg 28)</b>	<b>5.40%</b>	<b>10.85%</b>	-
● Allan Gray Balanced - A	7.09%	6.33%	-
● Coronation Balanced Plus - A	7.50%	7.33%	-
● Discovery Balanced - A	7.30%	8.87%	-
● Foord Balanced - R	7.23%	7.83%	-
● Ninety One Opportunity - A	6.80%	5.62%	-
● Old Mutual Balanced - A	6.26%	10.07%	-
● M&G Balanced - A	6.25%	8.47%	-
● PSG Balanced - A	8.89%	10.60%	-
● Sanlam Balanced - A	4.99%	9.07%	-
● STANLIB Multi-Strategy Growth B1	6.40%	9.58%	-

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**INDUSTRY COMPARISON - 3 MONTHS (31/07/2024 TO 31/10/2024, DAILY RISK)**

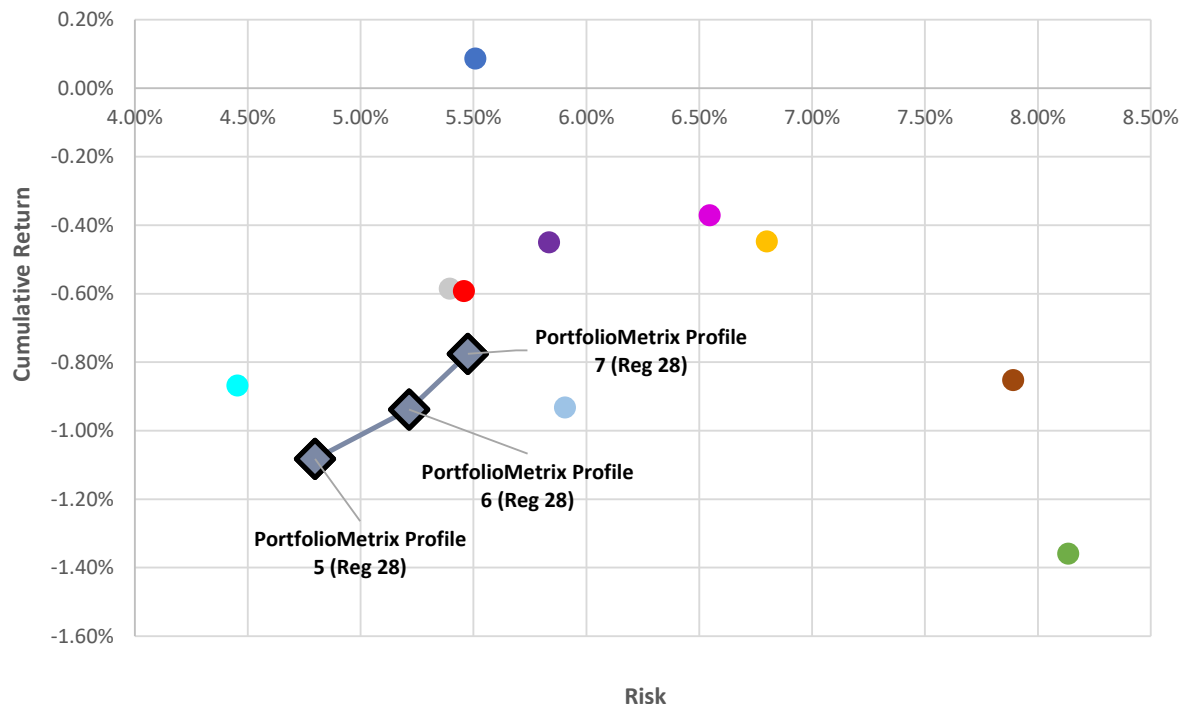


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetrix Profile 7 (Reg 28)</b>	<b>6.75%</b>	<b>3.30%</b>	-
<b>PortfolioMetrix Profile 6 (Reg 28)</b>	<b>6.16%</b>	<b>3.30%</b>	-
<b>PortfolioMetrix Profile 5 (Reg 28)</b>	<b>5.36%</b>	<b>3.32%</b>	-
● Allan Gray Balanced - A	6.64%	0.87%	-
● Coronation Balanced Plus - A	8.25%	3.30%	-
● Discovery Balanced - A	7.68%	3.74%	-
● Foord Balanced - R	7.61%	4.20%	-
● Ninety One Opportunity - A	6.27%	1.50%	-
● Old Mutual Balanced - A	6.43%	3.45%	-
● M&G Balanced - A	6.89%	3.15%	-
● PSG Balanced - A	9.51%	3.57%	-
● Sanlam Balanced - A	5.22%	2.67%	-
● STANLIB Multi-Strategy Growth B1	6.88%	3.38%	-

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**INDUSTRY COMPARISON - 1 MONTH (30/09/2024 TO 31/10/2024, DAILY RISK)**



	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetrix Profile 7 (Reg 28)</b>	<b>5.47%</b>	<b>-0.78%</b>	-
<b>PortfolioMetrix Profile 6 (Reg 28)</b>	<b>5.21%</b>	<b>-0.94%</b>	-
<b>PortfolioMetrix Profile 5 (Reg 28)</b>	<b>4.80%</b>	<b>-1.08%</b>	-
● Allan Gray Balanced - A	5.39%	-0.58%	-
● Coronation Balanced Plus - A	6.80%	-0.45%	-
● Discovery Balanced - A	6.55%	-0.37%	-
● Foord Balanced - R	7.89%	-0.85%	-
● Ninety One Opportunity - A	5.91%	-0.93%	-
● Old Mutual Balanced - A	5.83%	-0.45%	-
● M&G Balanced - A	5.46%	-0.59%	-
● PSG Balanced - A	8.13%	-1.36%	-
● Sanlam Balanced - A	4.45%	-0.87%	-
● STANLIB Multi-Strategy Growth B1	5.51%	0.09%	-

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