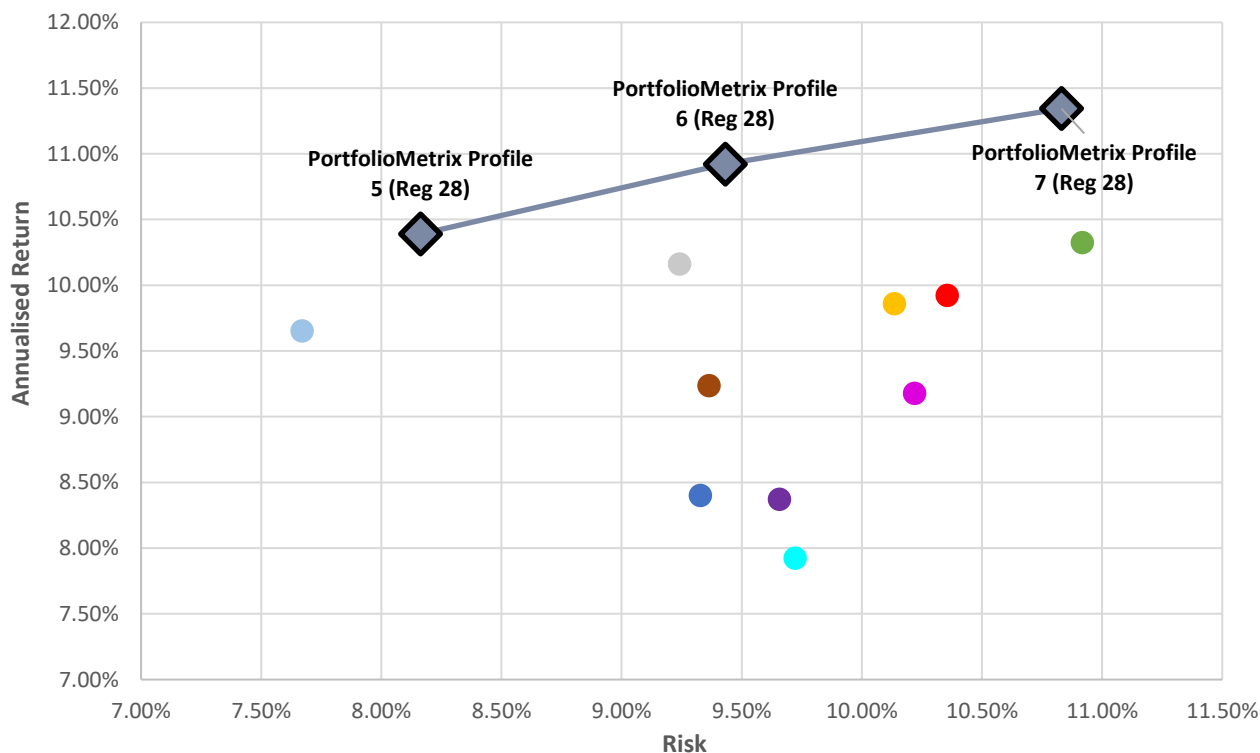


**INDUSTRY COMPARISON - INCEPTION (03/12/2010 TO 24/11/2023, WEEKLY RISK)**

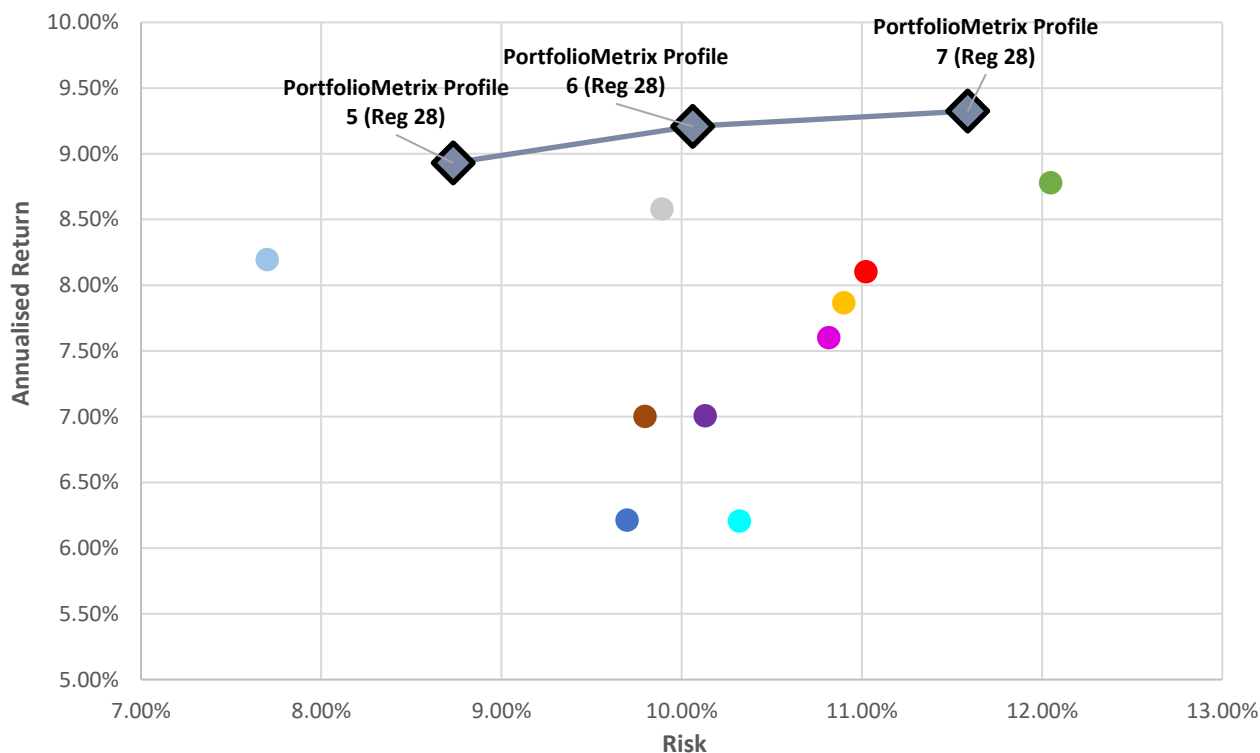


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetric Profile 7 (Reg 28)</b>	<b>10.83%</b>	<b>305.93%</b>	<b>11.34%</b>
<b>PortfolioMetric Profile 6 (Reg 28)</b>	<b>9.43%</b>	<b>286.30%</b>	<b>10.92%</b>
<b>PortfolioMetric Profile 5 (Reg 28)</b>	<b>8.16%</b>	<b>262.83%</b>	<b>10.39%</b>
● Allan Gray Balanced - A	9.24%	253.22%	10.16%
● Coronation Balanced Plus - A	10.13%	240.84%	9.86%
● Discovery Balanced - A	10.22%	214.23%	9.18%
● Foord Balanced - R	9.36%	216.37%	9.24%
● Ninety One Managed - A	7.67%	232.53%	9.65%
● Old Mutual Balanced - A	9.66%	185.27%	8.37%
● M&G Balanced - A	10.35%	243.39%	9.92%
● PSG Balanced - A	10.92%	260.07%	10.32%
● Sanlam Balanced - A	9.72%	170.34%	7.93%
● STANLIB Balanced - B1	9.33%	186.32%	8.40%

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**INDUSTRY COMPARISON - 10 YEAR (06/12/2013 TO 24/11/2023, WEEKLY RISK)**

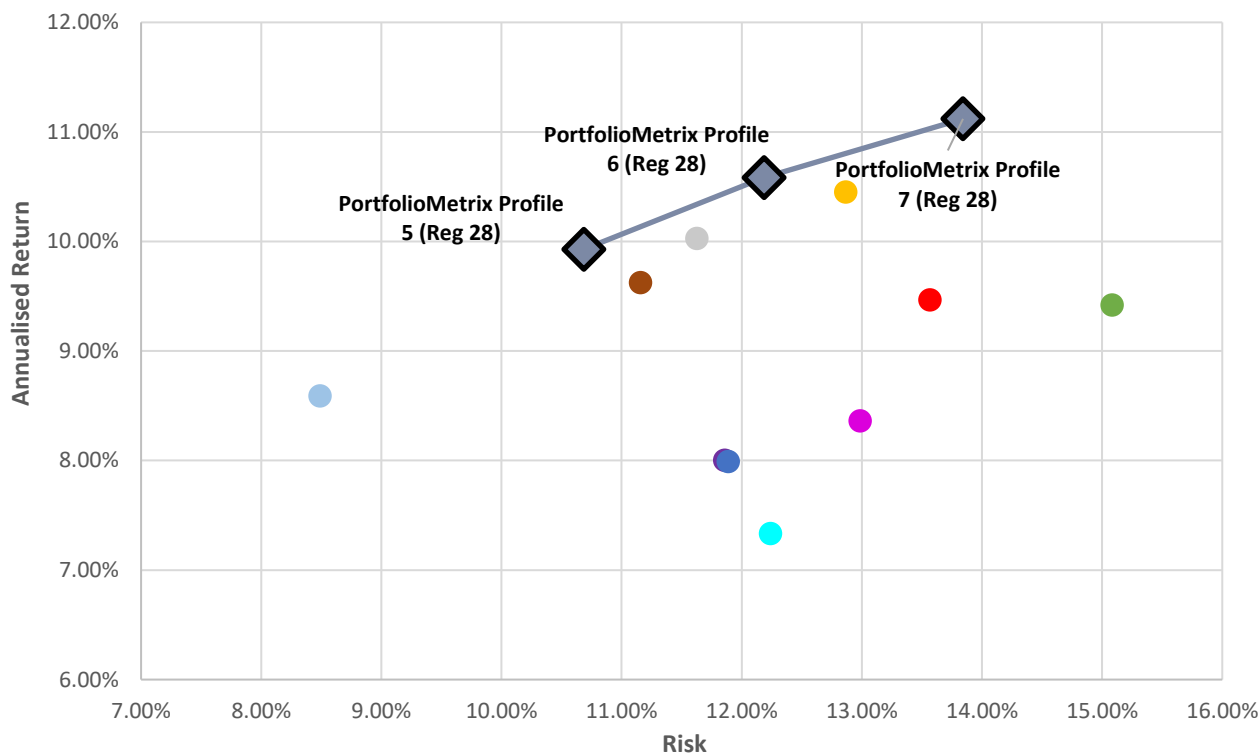


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetric Profile 7 (Reg 28)</b>	<b>11.59%</b>	<b>143.89%</b>	<b>9.33%</b>
<b>PortfolioMetric Profile 6 (Reg 28)</b>	<b>10.06%</b>	<b>141.31%</b>	<b>9.21%</b>
<b>PortfolioMetric Profile 5 (Reg 28)</b>	<b>8.73%</b>	<b>135.26%</b>	<b>8.93%</b>
● Allan Gray Balanced - A	9.89%	127.78%	8.58%
● Coronation Balanced Plus - A	10.90%	113.28%	7.87%
● Discovery Balanced - A	10.81%	108.09%	7.60%
● Foord Balanced - R	9.80%	96.74%	7.00%
● Ninety One Managed - A	7.70%	119.83%	8.20%
● Old Mutual Balanced - A	10.13%	96.87%	7.01%
● M&G Balanced - A	11.02%	118.01%	8.11%
● PSG Balanced - A	12.05%	132.03%	8.78%
● Sanlam Balanced - A	10.32%	82.61%	6.21%
● STANLIB Balanced - B1	9.70%	82.74%	6.21%

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**INDUSTRY COMPARISON - 5 YEAR (30/11/2018 TO 24/11/2023, WEEKLY RISK)**

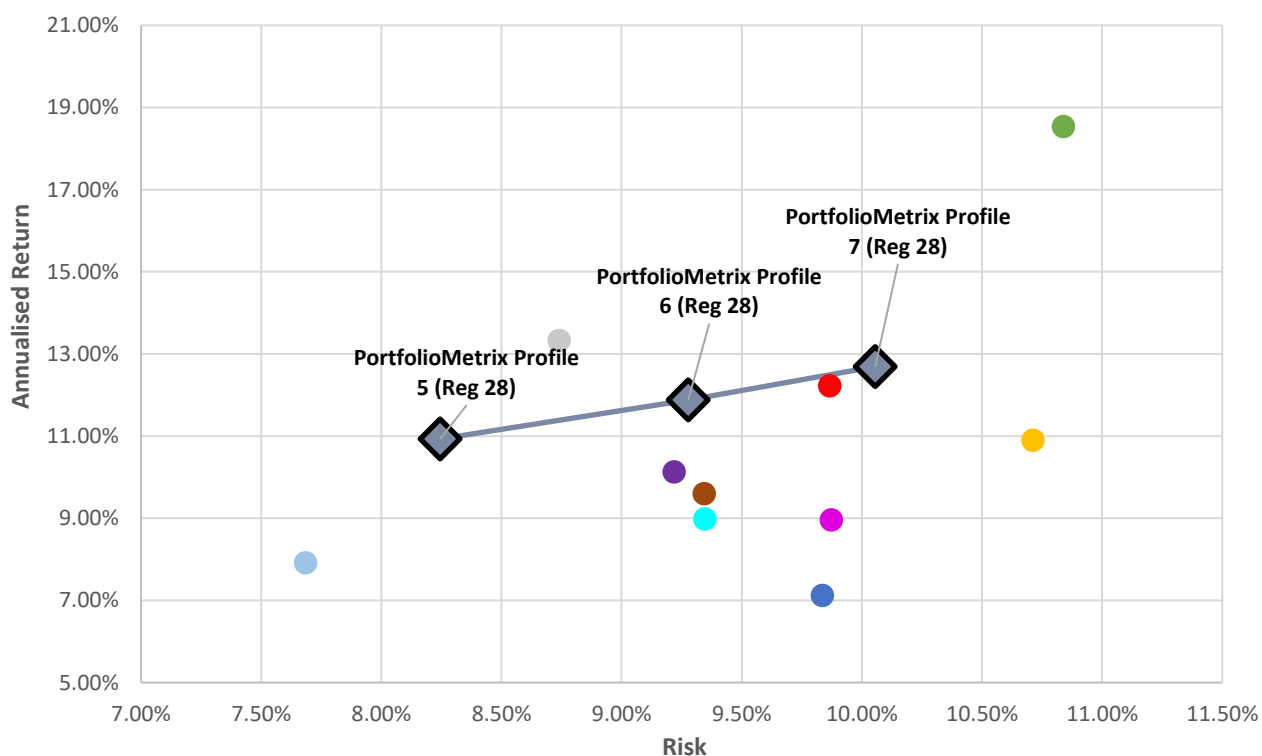


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetric Profile 7 (Reg 28)</b>	<b>13.84%</b>	<b>69.41%</b>	<b>11.12%</b>
<b>PortfolioMetric Profile 6 (Reg 28)</b>	<b>12.19%</b>	<b>65.37%</b>	<b>10.58%</b>
<b>PortfolioMetric Profile 5 (Reg 28)</b>	<b>10.69%</b>	<b>60.53%</b>	<b>9.93%</b>
● Allan Gray Balanced - A	11.63%	61.27%	10.03%
● Coronation Balanced Plus - A	12.86%	64.39%	10.45%
● Discovery Balanced - A	12.98%	49.43%	8.36%
● Foord Balanced - R	11.16%	58.32%	9.62%
● Ninety One Managed - A	8.49%	51.01%	8.59%
● Old Mutual Balanced - A	11.86%	46.95%	8.00%
● M&G Balanced - A	13.57%	57.20%	9.47%
● PSG Balanced - A	15.08%	56.86%	9.42%
● Sanlam Balanced - A	12.24%	42.46%	7.33%
● STANLIB Balanced - B1	11.89%	46.87%	7.99%

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**INDUSTRY COMPARISON - 3 YEAR (27/11/2020 TO 24/11/2023, WEEKLY RISK)**

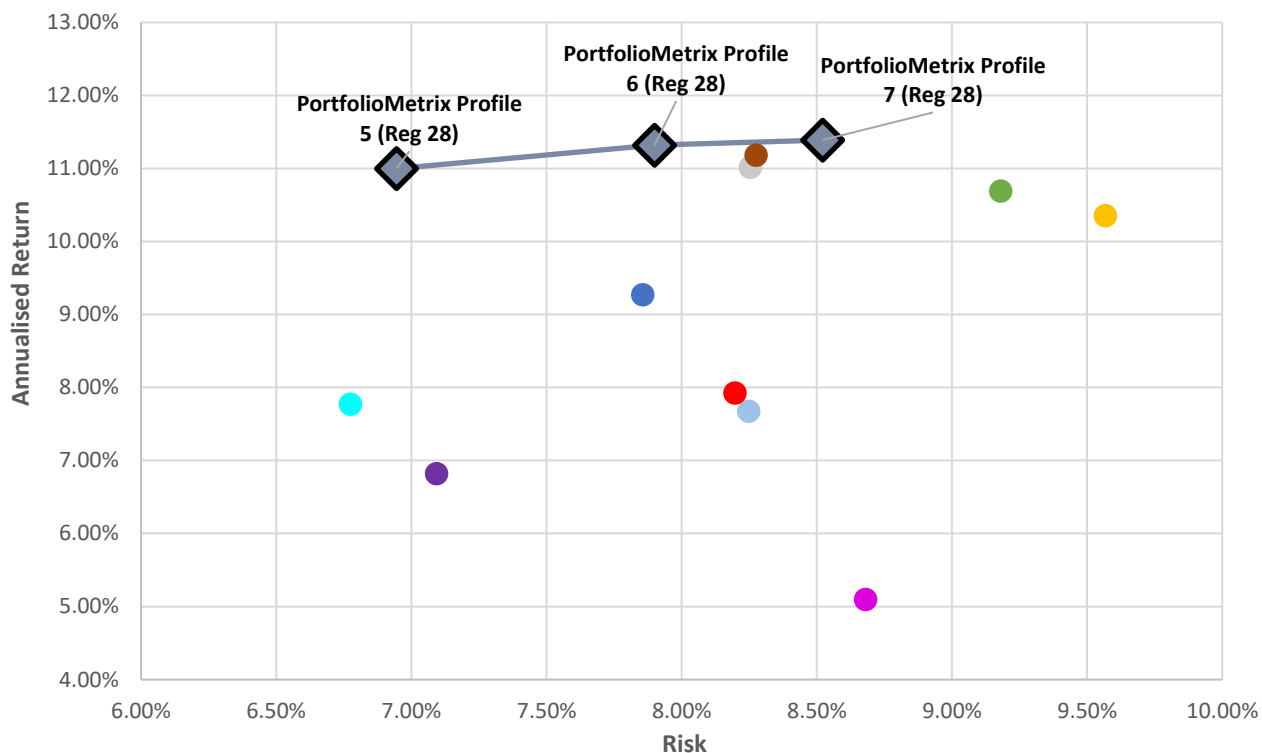


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetric Profile 7 (Reg 28)</b>	<b>10.06%</b>	<b>43.11%</b>	<b>12.69%</b>
<b>PortfolioMetric Profile 6 (Reg 28)</b>	<b>9.28%</b>	<b>40.05%</b>	<b>11.88%</b>
<b>PortfolioMetric Profile 5 (Reg 28)</b>	<b>8.25%</b>	<b>36.51%</b>	<b>10.93%</b>
● Allan Gray Balanced - A	8.74%	45.58%	13.34%
● Coronation Balanced Plus - A	10.71%	36.43%	10.91%
● Discovery Balanced - A	9.87%	29.37%	8.96%
● Foord Balanced - R	9.34%	31.66%	9.60%
● Ninety One Managed - A	7.68%	25.69%	7.92%
● Old Mutual Balanced - A	9.22%	33.58%	10.13%
● M&G Balanced - A	9.87%	41.35%	12.23%
● PSG Balanced - A	10.84%	66.58%	18.54%
● Sanlam Balanced - A	9.35%	29.46%	8.99%
● STANLIB Balanced - B1	9.83%	22.95%	7.13%

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**INDUSTRY COMPARISON - 1 YEAR (30/11/2022 TO 30/11/2023, DAILY RISK)**

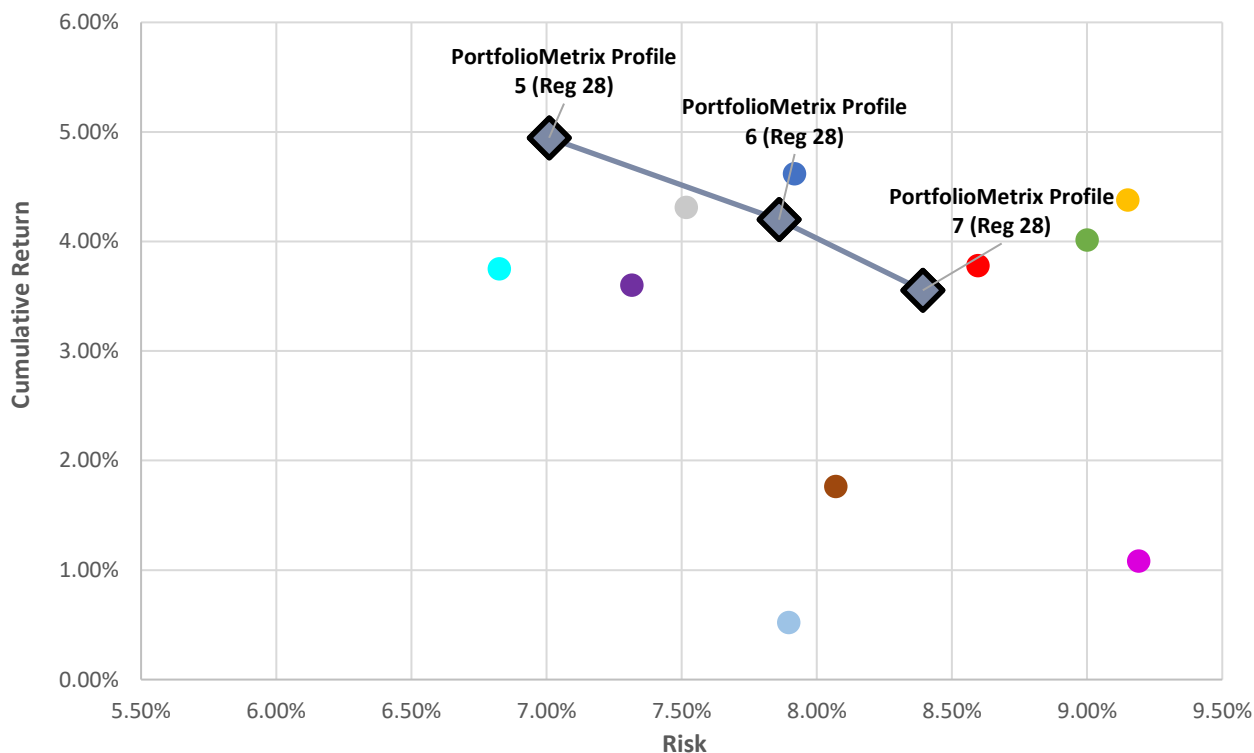


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetrix Profile 7 (Reg 28)</b>	<b>8.52%</b>	<b>11.39%</b>	<b>11.39%</b>
<b>PortfolioMetrix Profile 6 (Reg 28)</b>	<b>7.90%</b>	<b>11.32%</b>	<b>11.32%</b>
<b>PortfolioMetrix Profile 5 (Reg 28)</b>	<b>6.94%</b>	<b>11.00%</b>	<b>11.00%</b>
● Allan Gray Balanced - A	8.25%	11.02%	11.02%
● Coronation Balanced Plus - A	9.57%	10.35%	10.35%
● Discovery Balanced - A	8.68%	5.10%	5.10%
● Foord Balanced - R	8.28%	11.18%	11.18%
● Ninety One Managed - A	8.25%	7.67%	7.67%
● Old Mutual Balanced - A	7.09%	6.82%	6.82%
● M&G Balanced - A	8.20%	7.93%	7.93%
● PSG Balanced - A	9.18%	10.69%	10.69%
● Sanlam Balanced - A	6.77%	7.77%	7.77%
● STANLIB Balanced - B1	7.86%	9.27%	9.27%

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**INDUSTRY COMPARISON - 6 MONTHS (31/05/2023 TO 30/11/2023, DAILY RISK)**

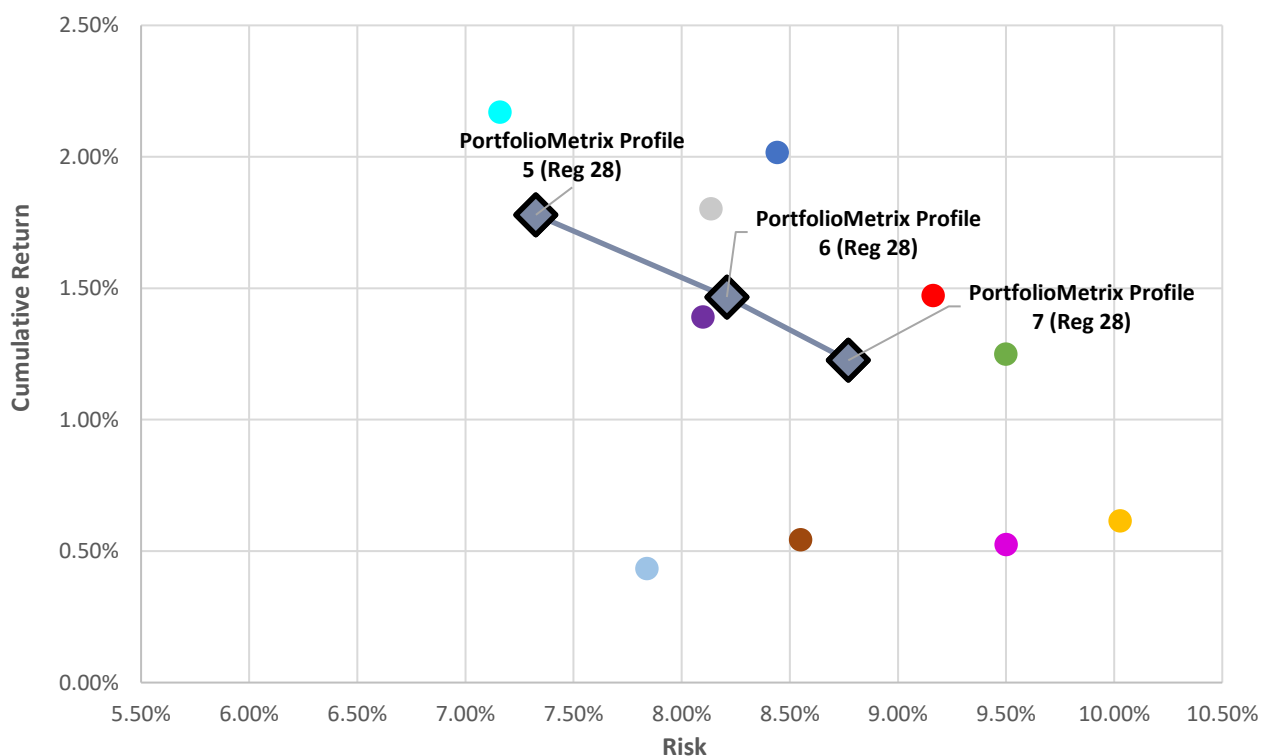


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetrix Profile 7 (Reg 28)</b>	<b>8.39%</b>	<b>3.55%</b>	-
<b>PortfolioMetrix Profile 6 (Reg 28)</b>	<b>7.86%</b>	<b>4.20%</b>	-
<b>PortfolioMetrix Profile 5 (Reg 28)</b>	<b>7.01%</b>	<b>4.95%</b>	-
● Allan Gray Balanced - A	7.52%	4.31%	-
● Coronation Balanced Plus - A	9.15%	4.38%	-
● Discovery Balanced - A	9.19%	1.08%	-
● Foord Balanced - R	8.07%	1.77%	-
● Ninety One Managed - A	7.89%	0.52%	-
● Old Mutual Balanced - A	7.32%	3.60%	-
● M&G Balanced - A	8.60%	3.78%	-
● PSG Balanced - A	9.00%	4.01%	-
● Sanlam Balanced - A	6.83%	3.75%	-
● STANLIB Balanced - B1	7.92%	4.62%	-

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**INDUSTRY COMPARISON - 3 MONTHS (31/08/2023 TO 30/11/2023, DAILY RISK)**

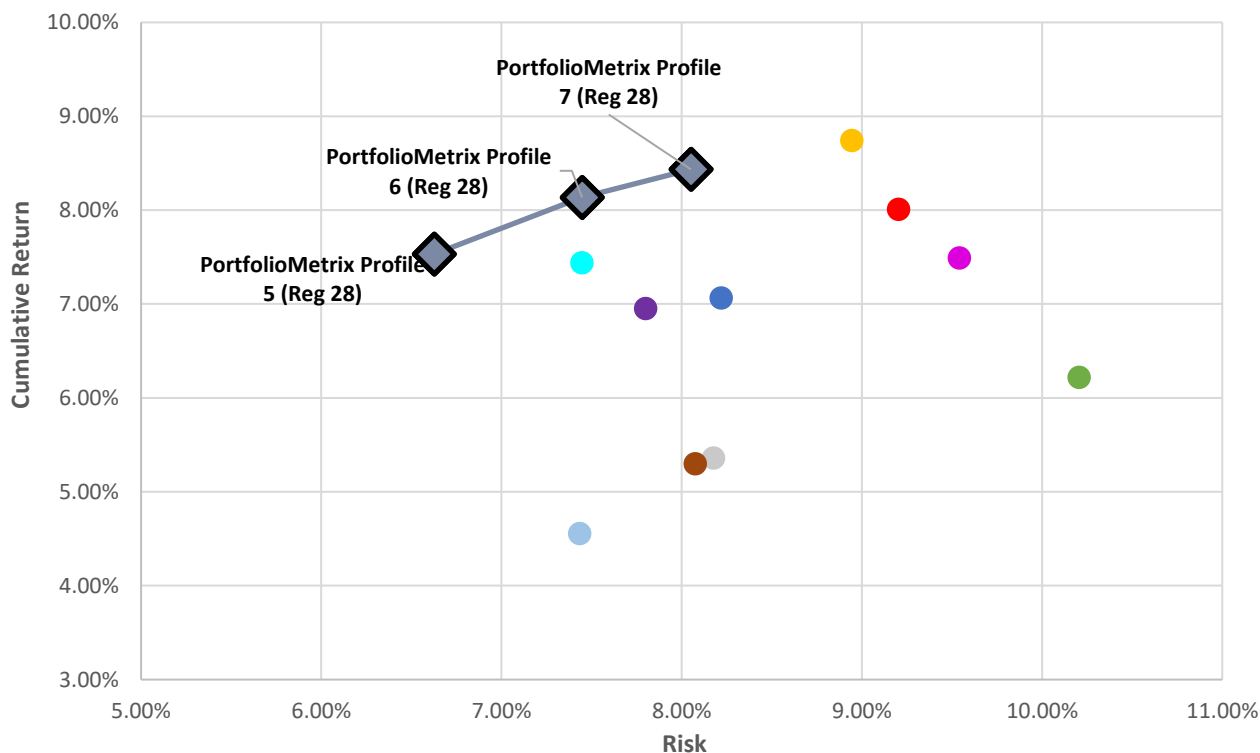


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetrix Profile 7 (Reg 28)</b>	<b>8.77%</b>	<b>1.23%</b>	-
<b>PortfolioMetrix Profile 6 (Reg 28)</b>	<b>8.21%</b>	<b>1.47%</b>	-
<b>PortfolioMetrix Profile 5 (Reg 28)</b>	<b>7.33%</b>	<b>1.78%</b>	-
● Allan Gray Balanced - A	8.13%	1.80%	-
● Coronation Balanced Plus - A	10.03%	0.62%	-
● Discovery Balanced - A	9.50%	0.53%	-
● Foord Balanced - R	8.55%	0.54%	-
● Ninety One Managed - A	7.84%	0.43%	-
● Old Mutual Balanced - A	8.10%	1.39%	-
● M&G Balanced - A	9.16%	1.47%	-
● PSG Balanced - A	9.50%	1.25%	-
● Sanlam Balanced - A	7.16%	2.17%	-
● STANLIB Balanced - B1	8.44%	2.02%	-

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**INDUSTRY COMPARISON - 1 MONTH (31/10/2023 TO 30/11/2023, DAILY RISK)**



Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
<b>PortfolioMetrix Profile 7 (Reg 28)</b>	<b>8.05%</b>	<b>8.43%</b>	-
<b>PortfolioMetrix Profile 6 (Reg 28)</b>	<b>7.45%</b>	<b>8.14%</b>	-
<b>PortfolioMetrix Profile 5 (Reg 28)</b>	<b>6.63%</b>	<b>7.53%</b>	-
● Allan Gray Balanced - A	8.18%	5.36%	-
● Coronation Balanced Plus - A	8.94%	8.74%	-
● Discovery Balanced - A	9.54%	7.49%	-
● Foord Balanced - R	8.07%	5.30%	-
● Ninety One Managed - A	7.43%	4.56%	-
● Old Mutual Balanced - A	7.80%	6.96%	-
● M&G Balanced - A	9.20%	8.01%	-
● PSG Balanced - A	10.21%	6.22%	-
● Sanlam Balanced - A	7.45%	7.44%	-
● STANLIB Balanced - B1	8.22%	7.07%	-

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