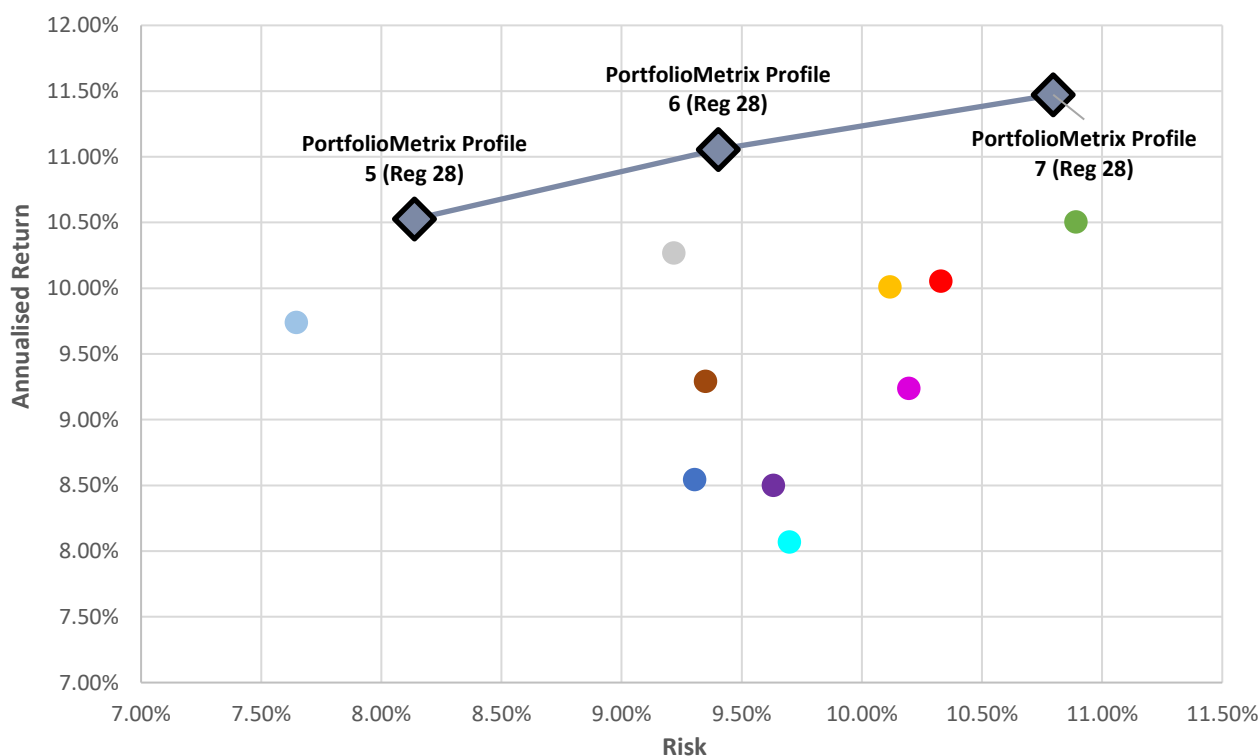


INDUSTRY COMPARISON - INCEPTION (03/12/2010 TO 29/12/2023, WEEKLY RISK)

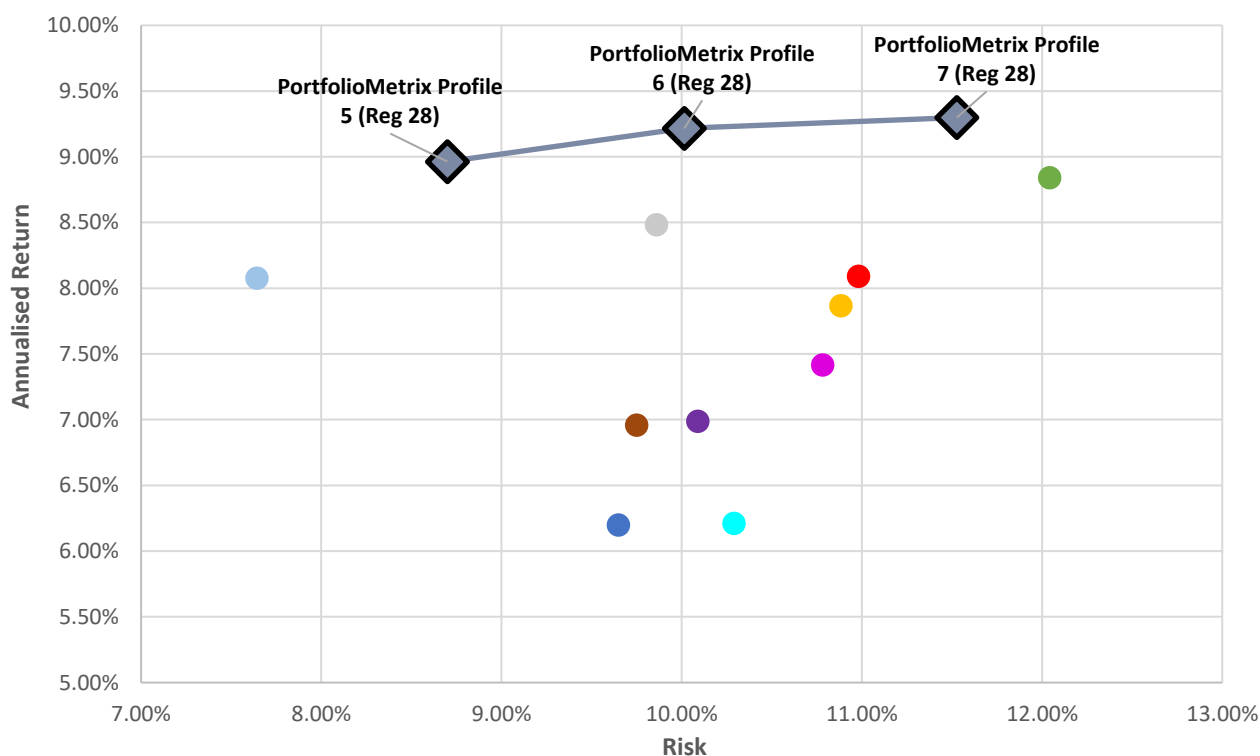


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
PortfolioMetric Profile 7 (Reg 28)	10.80%	316.41%	11.47%
PortfolioMetric Profile 6 (Reg 28)	9.40%	296.45%	11.06%
PortfolioMetric Profile 5 (Reg 28)	8.14%	272.33%	10.53%
● Allan Gray Balanced - A	9.22%	261.12%	10.27%
● Coronation Balanced Plus - A	10.12%	250.12%	10.01%
● Discovery Balanced - A	10.19%	219.28%	9.24%
● Foord Balanced - R	9.35%	221.29%	9.29%
● Ninety One Managed - A	7.65%	239.02%	9.74%
● Old Mutual Balanced - A	9.63%	192.03%	8.50%
● M&G Balanced - A	10.33%	251.98%	10.05%
● PSG Balanced - A	10.89%	271.43%	10.51%
● Sanlam Balanced - A	9.70%	177.21%	8.07%
● STANLIB Balanced - B1	9.30%	193.58%	8.55%

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INDUSTRY COMPARISON - 10 YEAR (10/01/2014 TO 29/12/2023, WEEKLY RISK)

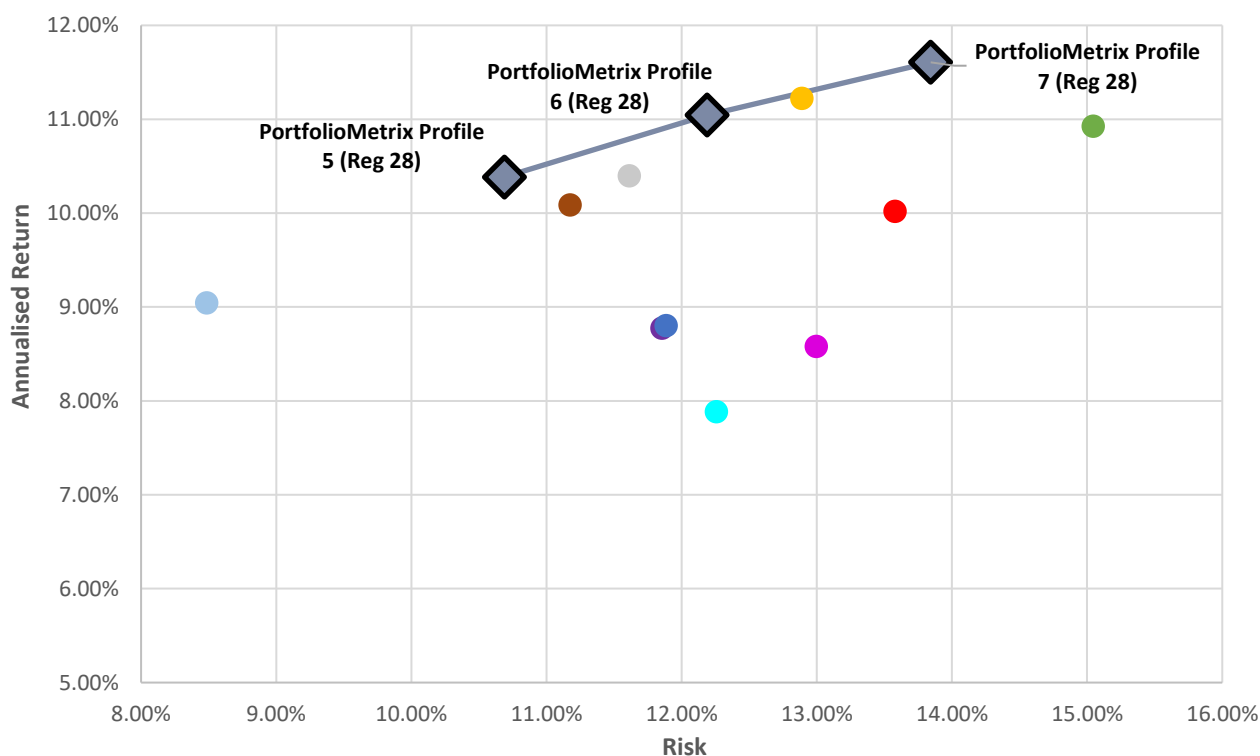


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
PortfolioMetric Profile 7 (Reg 28)	11.53%	143.29%	9.30%
PortfolioMetric Profile 6 (Reg 28)	10.01%	141.47%	9.22%
PortfolioMetric Profile 5 (Reg 28)	8.70%	135.94%	8.96%
● Allan Gray Balanced - A	9.86%	125.79%	8.49%
● Coronation Balanced Plus - A	10.88%	113.26%	7.87%
● Discovery Balanced - A	10.78%	104.53%	7.42%
● Foord Balanced - R	9.75%	95.96%	6.96%
● Ninety One Managed - A	7.64%	117.47%	8.08%
● Old Mutual Balanced - A	10.09%	96.51%	6.99%
● M&G Balanced - A	10.98%	117.73%	8.09%
● PSG Balanced - A	12.04%	133.32%	8.84%
● Sanlam Balanced - A	10.29%	82.69%	6.21%
● STANLIB Balanced - B1	9.65%	82.50%	6.20%

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INDUSTRY COMPARISON - 5 YEAR (04/01/2019 TO 29/12/2023, WEEKLY RISK)

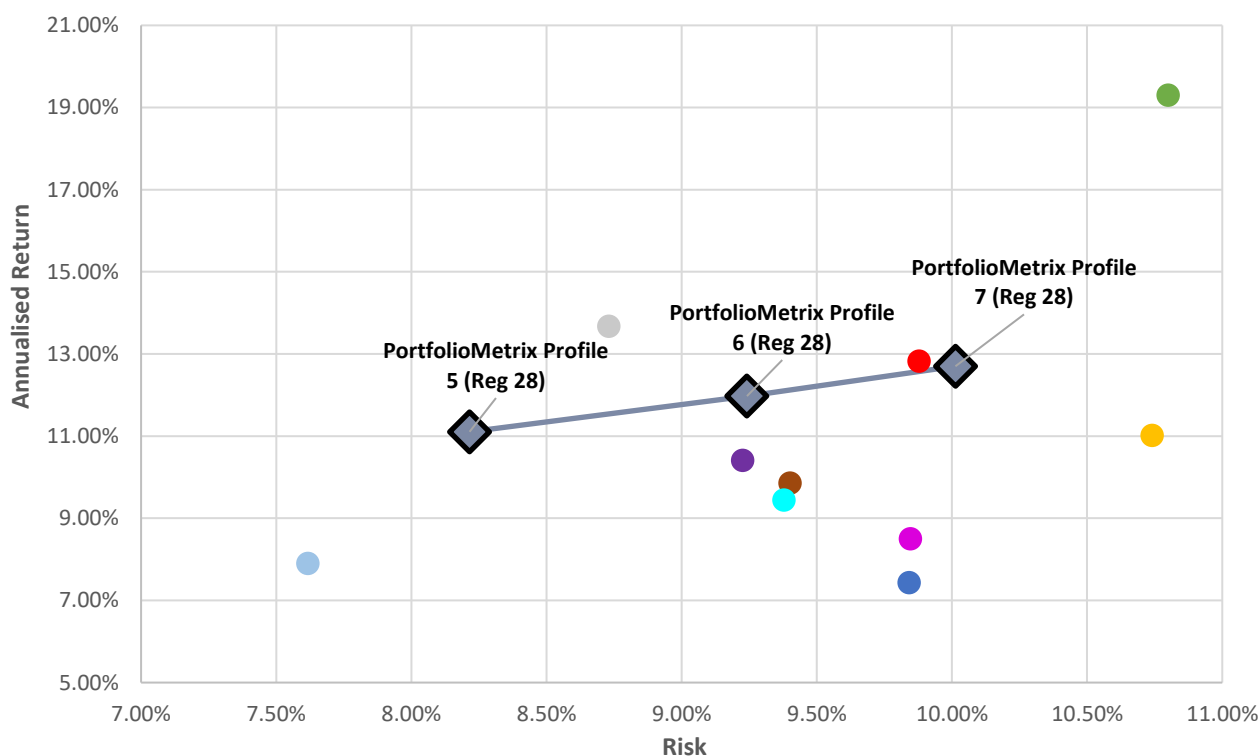


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
PortfolioMetrix Profile 7 (Reg 28)	13.84%	73.16%	11.61%
PortfolioMetrix Profile 6 (Reg 28)	12.19%	68.85%	11.05%
PortfolioMetrix Profile 5 (Reg 28)	10.69%	63.89%	10.39%
● Allan Gray Balanced - A	11.61%	63.98%	10.40%
● Coronation Balanced Plus - A	12.89%	70.20%	11.22%
● Discovery Balanced - A	12.99%	50.94%	8.58%
● Foord Balanced - R	11.17%	61.68%	10.09%
● Ninety One Managed - A	8.48%	54.18%	9.05%
● Old Mutual Balanced - A	11.85%	52.29%	8.78%
● M&G Balanced - A	13.58%	61.21%	10.02%
● PSG Balanced - A	15.04%	67.95%	10.93%
● Sanlam Balanced - A	12.26%	46.17%	7.89%
● STANLIB Balanced - B1	11.88%	52.47%	8.80%

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INDUSTRY COMPARISON - 3 YEAR (01/01/2021 TO 29/12/2023, WEEKLY RISK)

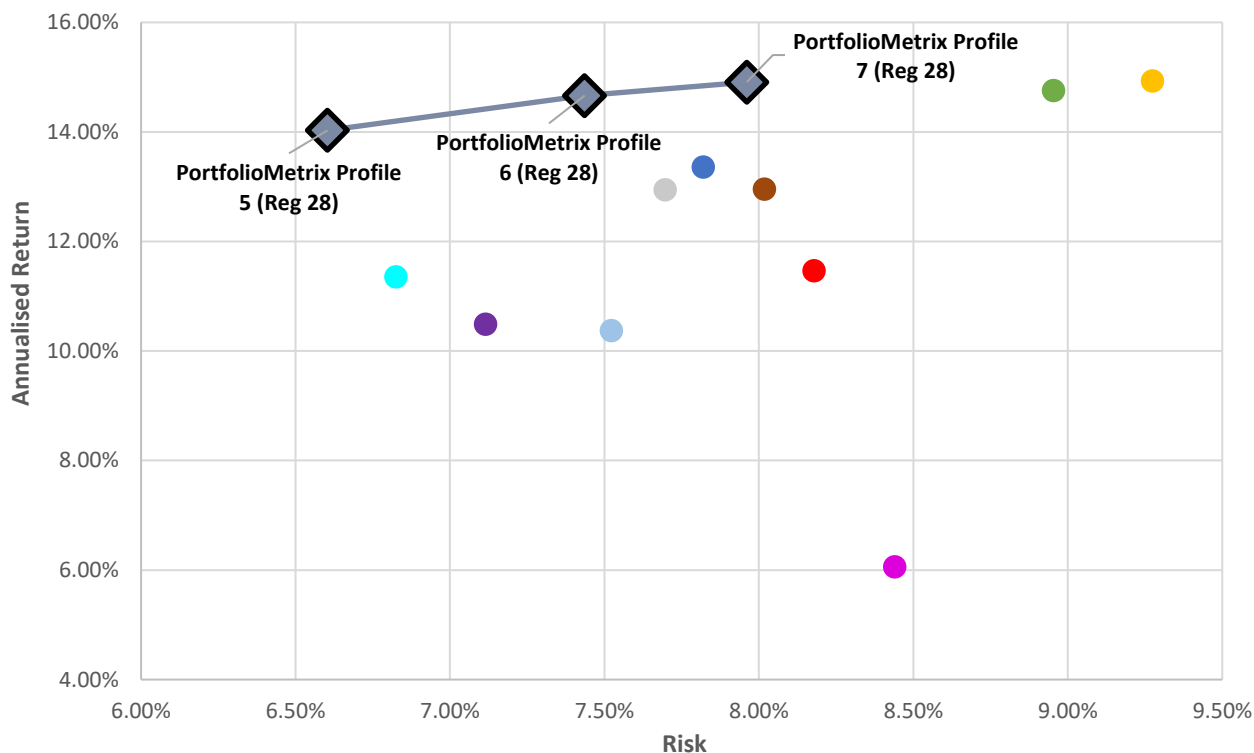


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
PortfolioMetric Profile 7 (Reg 28)	10.01%	43.15%	12.70%
PortfolioMetric Profile 6 (Reg 28)	9.24%	40.40%	11.97%
PortfolioMetric Profile 5 (Reg 28)	8.22%	37.15%	11.11%
● Allan Gray Balanced - A	8.73%	46.91%	13.68%
● Coronation Balanced Plus - A	10.74%	36.86%	11.03%
● Discovery Balanced - A	9.85%	27.74%	8.50%
● Foord Balanced - R	9.40%	32.59%	9.86%
● Ninety One Managed - A	7.62%	25.64%	7.91%
● Old Mutual Balanced - A	9.22%	34.62%	10.42%
● M&G Balanced - A	9.88%	43.63%	12.83%
● PSG Balanced - A	10.80%	69.81%	19.30%
● Sanlam Balanced - A	9.38%	31.09%	9.44%
● STANLIB Balanced - B1	9.84%	24.02%	7.44%

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INDUSTRY COMPARISON - 1 YEAR (30/12/2022 TO 29/12/2023, DAILY RISK)

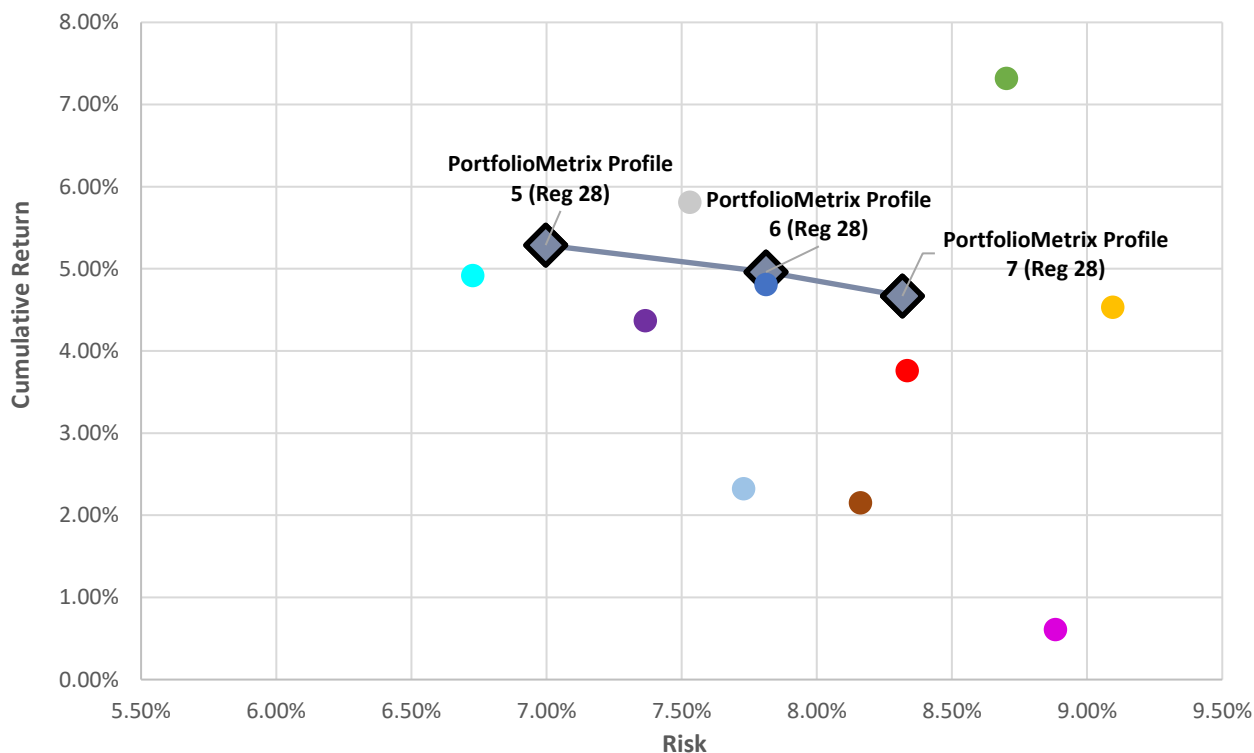


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
PortfolioMetric Profile 7 (Reg 28)	7.96%	14.91%	14.91%
PortfolioMetric Profile 6 (Reg 28)	7.44%	14.66%	14.66%
PortfolioMetric Profile 5 (Reg 28)	6.60%	14.03%	14.03%
● Allan Gray Balanced - A	7.70%	12.94%	12.94%
● Coronation Balanced Plus - A	9.27%	14.94%	14.94%
● Discovery Balanced - A	8.44%	6.06%	6.06%
● Foord Balanced - R	8.02%	12.96%	12.96%
● Ninety One Managed - A	7.52%	10.38%	10.38%
● Old Mutual Balanced - A	7.11%	10.49%	10.49%
● M&G Balanced - A	8.18%	11.47%	11.47%
● PSG Balanced - A	8.95%	14.76%	14.76%
● Sanlam Balanced - A	6.82%	11.35%	11.35%
● STANLIB Balanced - B1	7.82%	13.36%	13.36%

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INDUSTRY COMPARISON - 6 MONTHS (30/06/2023 TO 29/12/2023, DAILY RISK)

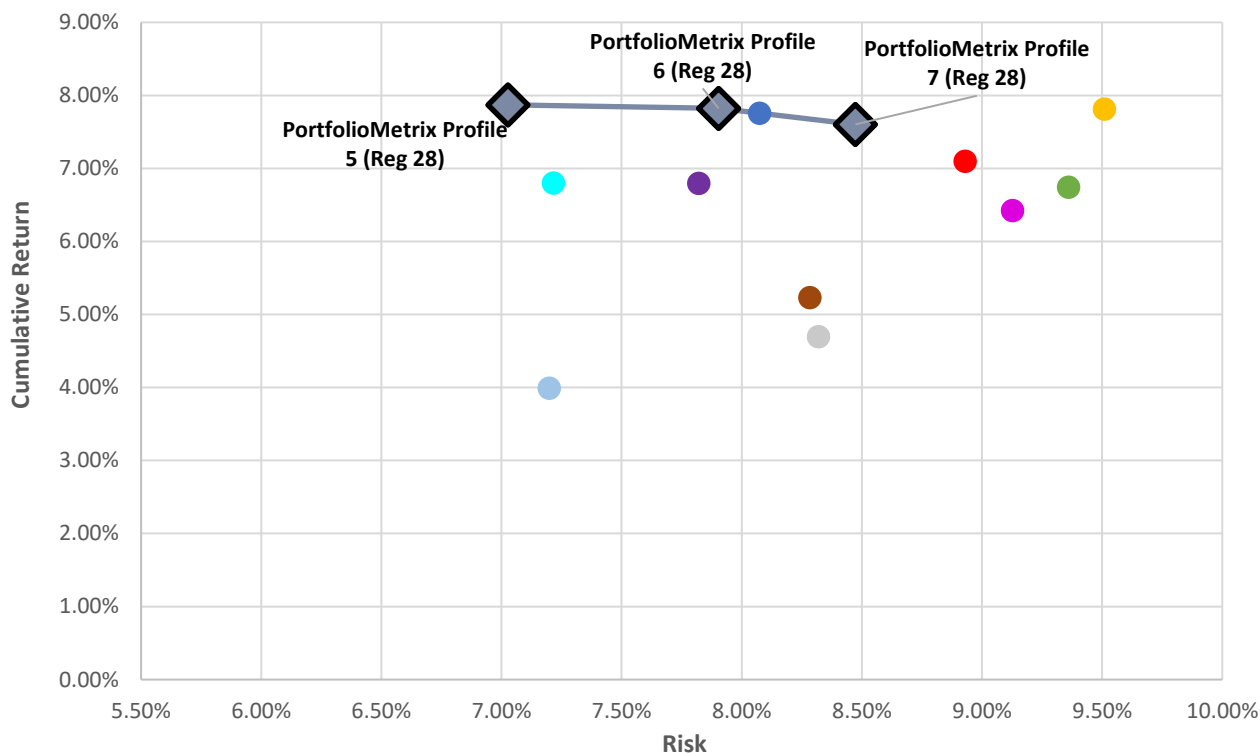


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
PortfolioMetric Profile 7 (Reg 28)	8.32%	4.67%	-
PortfolioMetric Profile 6 (Reg 28)	7.81%	4.96%	-
PortfolioMetric Profile 5 (Reg 28)	7.00%	5.29%	-
● Allan Gray Balanced - A	7.53%	5.81%	-
● Coronation Balanced Plus - A	9.09%	4.53%	-
● Discovery Balanced - A	8.88%	0.61%	-
● Foord Balanced - R	8.16%	2.15%	-
● Ninety One Managed - A	7.73%	2.32%	-
● Old Mutual Balanced - A	7.36%	4.37%	-
● M&G Balanced - A	8.33%	3.76%	-
● PSG Balanced - A	8.70%	7.32%	-
● Sanlam Balanced - A	6.73%	4.92%	-
● STANLIB Balanced - B1	7.81%	4.81%	-

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INDUSTRY COMPARISON - 3 MONTHS (29/09/2023 TO 29/12/2023, DAILY RISK)

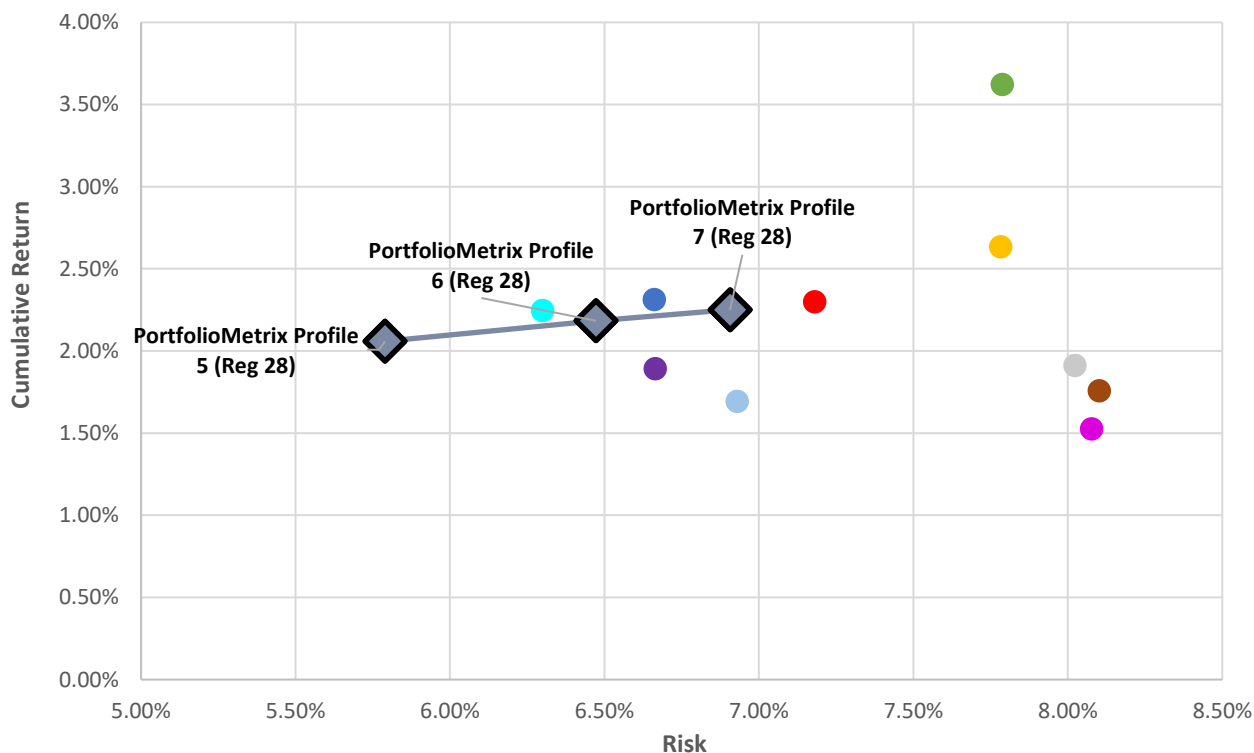


Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
PortfolioMetrix Profile 7 (Reg 28)	8.47%	7.60%	-
PortfolioMetrix Profile 6 (Reg 28)	7.90%	7.82%	-
PortfolioMetrix Profile 5 (Reg 28)	7.03%	7.87%	-
● Allan Gray Balanced - A	8.32%	4.70%	-
● Coronation Balanced Plus - A	9.51%	7.82%	-
● Discovery Balanced - A	9.13%	6.42%	-
● Foord Balanced - R	8.28%	5.23%	-
● Ninety One Managed - A	7.20%	3.99%	-
● Old Mutual Balanced - A	7.82%	6.80%	-
● M&G Balanced - A	8.93%	7.10%	-
● PSG Balanced - A	9.36%	6.75%	-
● Sanlam Balanced - A	7.22%	6.80%	-
● STANLIB Balanced - B1	8.07%	7.76%	-

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INDUSTRY COMPARISON - 1 MONTH (30/11/2023 TO 29/12/2023, DAILY RISK)



Data Source: Financial Express

	Risk	Cumulative Return	Annualised Return
PortfolioMetric Profile 7 (Reg 28)	6.91%	2.25%	-
PortfolioMetric Profile 6 (Reg 28)	6.47%	2.18%	-
PortfolioMetric Profile 5 (Reg 28)	5.79%	2.06%	-
● Allan Gray Balanced - A	8.02%	1.91%	-
● Coronation Balanced Plus - A	7.78%	2.64%	-
● Discovery Balanced - A	8.08%	1.53%	-
● Foord Balanced - R	8.10%	1.76%	-
● Ninety One Managed - A	6.93%	1.69%	-
● Old Mutual Balanced - A	6.66%	1.89%	-
● M&G Balanced - A	7.18%	2.30%	-
● PSG Balanced - A	7.79%	3.62%	-
● Sanlam Balanced - A	6.30%	2.25%	-
● STANLIB Balanced - B1	6.66%	2.31%	-

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