

# OLD MUTUAL WEALTH INCOME / ETHICAL / EQUITY

## PERFORMANCE

PMS PERFORMANCE TABLE to 31<sup>st</sup> March 2019

Portfolio	Cumulative Performance						Discrete Annual Performance										Rolling 5 year Data						
	YTD	1 Year	3 Years	5 Years	10 Years	Since Launch 01/11/2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	Alpha	Beta	Sharpe Ratio	Info Ratio	Vol	Max DD	
<b>Outperformance</b>																							
Portfolio Income	5.46	2.73	20.50	31.50	127.57	131.10	17.18	10.88	-0.55	10.99	12.46	6.11	3.31	10.17	10.51	-5.35	1.31	0.72	0.70	-0.11	5.18	-6.17	
IA Benchmark	6.45	4.30	24.02	33.18	129.15	126.90	20.12	12.29	-5.51	9.97	14.47	4.87	2.66	12.87	9.98	-6.11	0.00	1.00	0.56	0.00	6.91	-8.68	
Portfolio Ethical	7.67	4.42	23.15	36.13	148.24	140.99	18.11	12.65	-3.77	12.16	15.34	5.84	5.19	10.39	11.37	-6.58	1.18	0.87	0.68	0.19	6.41	-8.40	
IA Benchmark	6.45	4.30	24.02	33.18	129.15	126.90	20.12	12.29	-5.51	9.97	14.47	4.87	2.66	12.87	9.98	-6.11	0.00	1.00	0.56	0.00	6.91	-8.68	
Portfolio Equity	7.55	1.73	34.80	55.59	224.54	240.19	33.99	20.78	-10.10	15.30	17.88	6.07	8.17	16.29	18.72	-8.37	1.30	0.80	0.84	-0.16	8.65	-10.80	
IA Benchmark	9.80	8.96	43.81	60.22	199.73	198.31	22.95	15.78	-9.27	9.43	21.65	7.09	2.77	23.33	14.02	-5.72	0.00	1.00	0.78	0.00	10.12	-12.30	

Please find the details for the associated benchmarks at the back of this document.

\*For historic lifestyled performance please contact a member of the IBOSS team.

Source of Data:  **FE ANALYTICS**  
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# BENCHMARKS

## Portfolio

Income/Ethical

Equity

## Benchmark

IA Mixed Investment 40%-85% Shares

IA Global

NB. MPU Figures are calculated on a Total Return basis - Total return shows the total return of the instrument with all income reinvested, assuming income is taxed at basic rates of income tax.





# IMPORTANT INFORMATION

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