



This monthly update shows performance for all our model portfolios. Highlighting is as follows: for performance, green is **outperformance** and red is **underperformance** versus the relevant benchmark.

Portfolios by risk grade		Cumulative performance								
	Inception date	YTD	1m	3m	6m	12m	3 Years	5 Years	Since Inception	
Cautious portfolios										
Benchmark: ARC Cautious	-	4.02%	0.60%	2.27%	2.20%	1.16%	10.13%	15.09%	-	
Best Ideas (4)	Oct 13	5.68%	1.47%	3.81%	3.54%	2.41%	14.37%	22.50%	26.84%	
Low cost (4)	Oct 13	5.93%	0.76%	3.56%	3.91%	3.76%	21.58%	33.14%	36.50%	
Positive Impact (4)	Oct 13	7.43%	1.84%	4.43%	5.27%	3.56%	19.39%	30.55%	35.52%	
Cautious Plus portfolios										
Benchmark: ARC Balanced	-	6.40%	1.20%	3.72%	3.42%	2.06%	16.95%	23.58%	-	
Best Ideas (5)	Oct 13	6.56%	1.83%	4.42%	3.91%	2.73%	17.05%	25.84%	30.23%	
Low cost (5)	Oct 13	7.35%	1.56%	4.56%	4.40%	4.33%	25.39%	37.35%	40.97%	
Positive Impact (5)	Nov 15	8.73%	2.26%	5.25%	6.11%	4.13%	22.51%	-	25.23%	
Balanced portfolios										
Benchmark: ARC Balanced	-	6.40%	1.20%	3.72%	3.42%	2.06%	16.95%	23.58%	-	
Best Ideas (6)	Oct 13	8.25%	2.36%	5.45%	4.64%	3.62%	23.06%	30.22%	35.39%	
Low cost (6)	Oct 13	8.90%	2.16%	5.54%	5.02%	4.95%	30.04%	41.76%	45.76%	
Positive Impact (6)	Oct 13	10.28%	2.83%	6.21%	7.07%	4.88%	26.89%	40.81%	45.85%	
Balanced Plus portfolios										
Benchmark: ARC Steady Growth	-	8.51%	1.80%	5.13%	4.73%	3.59%	24.98%	33.05%	-	
Best Ideas (7)	Oct 13	9.39%	2.63%	6.02%	5.31%	3.85%	26.33%	33.04%	38.61%	
Low cost (7)	Oct 13	9.84%	2.53%	6.07%	5.67%	4.98%	32.84%	44.06%	48.49%	
Positive Impact (7)	Nov 15	11.45%	3.10%	6.88%	7.95%	5.27%	29.67%	-	32.56%	
Adventurous portfolios										
Benchmark: ARC Steady Growth	-	8.51%	1.80%	5.13%	4.73%	3.59%	24.98%	33.05%	-	
Best Ideas (8)	Oct 13	10.40%	2.80%	6.57%	6.17%	4.79%	33.81%	43.46%	48.31%	
Low cost (8)	Oct 13	10.73%	2.91%	6.54%	6.37%	5.28%	36.46%	48.09%	53.21%	
Positive Impact (8)	Oct 13	12.02%	3.16%	7.17%	8.56%	5.65%	32.73%	48.45%	53.32%	
Adventurous Plus portfolios										
Benchmark: ARC Equity	-	10.49%	2.30%	6.47%	5.93%	4.58%	31.08%	38.55%	-	
Best Ideas (9)	Nov 15	11.51%	3.09%	7.24%	7.10%	5.48%	38.54%	-	37.89%	
Low Cost (9)	Nov 15	11.62%	3.29%	7.01%	7.08%	5.51%	40.64%	-	44.88%	
Positive Impact (9)	Nov 15	12.71%	3.23%	7.60%	9.25%	6.13%	37.56%	-	41.30%	
High Octane portfolios										
Benchmark: ARC Equity	-	10.49%	2.30%	6.47%	5.93%	4.58%	31.08%	38.55%	-	
Best Ideas (10)	Oct 13	12.75%	3.17%	7.83%	8.31%	6.41%	46.89%	59.07%	63.22%	
Low Cost (10)	Nov 15	12.21%	3.61%	7.33%	7.75%	5.81%	44.38%	-	48.90%	
Positive Impact (10)	Nov 15	13.60%	3.35%	8.08%	10.14%	6.92%	42.38%	-	46.60%	

Past performance is not a reliable indicator of future performance. The value of investments and income derived from them can go down as well as up and you may get back less than originally invested.

If portfolios have short histories, performance and volatility data may not be shown. The performance figures shown may differ from the performance of the actual model itself due to the variation in timing of the initial and subsequent investments. Model performance is shown in sterling, net of underlying fund charges and an EQ management fee, but excludes platform and advice fees. Management fees included are 0.59% for Best Ideas and Positive Impact portfolios and 0.39% for Low Cost portfolios. Underlying fund charges may vary depending on platform. All income reinvested; actual returns may vary. We benchmark our model portfolios against Asset Risk Consultants (ARC) Private Client Indices. All ARC benchmark figures are based on participating investment managers' actual performance data, net of fees, following the last quarter end. Data sources: ARC, EQ, Morningstar. While this performance data is believed to be correct, it cannot be guaranteed. No representation or warranty, expressed or implied, is given as to its accuracy or completeness. EQ Investors Limited ("EQ"), its partners and employees accept no liability for the consequences of you or your advisers acting upon the information contained herein. This performance update constitutes neither investment advice, nor an offer to sell, nor is it a solicitation of an offer to purchase any security or any other investment or product. This performance data may not be reproduced or distributed in any format without EQ's prior written consent.

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Portfolios by risk grade		Volatility				Discrete performance				
	Inception date	12m	3 Years	5 Years	Since Incept	May 18 - Apr 19	May 17 - Apr 18	May 16 - Apr 17	May 15 - Apr 16	May 14 - Apr 15
Cautious portfolios										
Benchmark: ARC Cautious	-	3.46%	3.00%	2.99%	-	1.16%	1.60%	7.16%	-1.12%	5.69%
Best Ideas (4)	Oct 13	4.72%	3.94%	4.27%	4.29%	2.41%	4.48%	6.88%	-1.77%	9.04%
Low cost (4)	Oct 13	4.69%	5.12%	4.67%	4.72%	3.76%	3.41%	13.31%	1.06%	8.36%
Positive Impact (4)	Oct 13	5.71%	4.87%	4.95%	4.90%	3.56%	4.03%	10.82%	-0.09%	9.45%
Cautious Plus portfolios										
Benchmark: ARC Balanced	-	5.83%	4.72%	4.75%	-	2.06%	2.83%	11.43%	-1.99%	7.82%
Best Ideas (5)	Oct 13	5.71%	4.55%	4.86%	4.86%	2.73%	5.03%	8.49%	-2.23%	9.96%
Low cost (5)	Oct 13	5.80%	5.57%	5.31%	5.39%	4.33%	4.20%	15.34%	0.16%	9.37%
Positive Impact (5)	Nov 15	7.08%	5.60%	-	5.53%	4.13%	4.77%	12.30%	-	-
Balanced portfolios										
Benchmark: ARC Balanced	-	5.83%	4.72%	4.75%	-	2.06%	2.83%	11.43%	-1.99%	7.82%
Best Ideas (6)	Oct 13	7.32%	5.56%	5.73%	5.71%	3.62%	5.90%	12.14%	-2.79%	8.85%
Low cost (6)	Oct 13	7.43%	6.47%	6.30%	6.36%	4.95%	5.02%	17.99%	-1.13%	10.25%
Positive Impact (6)	Oct 13	8.74%	6.53%	6.55%	6.44%	4.88%	5.71%	14.45%	-0.42%	11.44%
Balanced Plus portfolios										
Benchmark: ARC Steady Growth	-	7.79%	6.28%	6.24%	-	3.59%	4.39%	15.58%	-2.42%	9.10%
Best Ideas (7)	Oct 13	8.44%	6.34%	6.45%	6.39%	3.85%	6.87%	13.83%	-3.70%	9.36%
Low cost (7)	Oct 13	8.36%	7.13%	7.03%	7.08%	4.98%	5.69%	19.73%	-2.10%	10.76%
Positive Impact (7)	Nov 15	9.97%	7.25%	-	7.26%	5.27%	6.44%	15.72%	-	-
Adventurous portfolios										
Benchmark: ARC Steady Growth	-	7.79%	6.28%	6.24%	-	3.59%	4.39%	15.58%	-2.42%	9.10%
Best Ideas (8)	Oct 13	9.57%	7.21%	7.43%	7.37%	4.79%	8.55%	17.63%	-4.75%	12.55%
Low cost (8)	Oct 13	9.33%	7.91%	8.02%	8.06%	5.28%	6.29%	21.95%	-3.57%	12.55%
Positive Impact (8)	Oct 13	10.85%	7.81%	7.95%	7.80%	5.65%	7.05%	17.35%	-1.01%	12.99%
Adventurous Plus portfolios										
Benchmark: ARC Equity	-	9.51%	7.57%	7.49%	-	4.58%	5.52%	18.79%	-3.28%	9.28%
Best Ideas (9)	Nov 15	10.61%	8.02%	-	8.20%	5.48%	9.12%	20.37%	-	-
Low Cost (9)	Nov 15	10.45%	8.78%	-	8.59%	5.51%	7.12%	24.43%	-	-
Positive Impact (9)	Nov 15	11.80%	8.47%	-	8.68%	6.13%	7.45%	20.64%	-	-
High Octane portfolios										
Benchmark: ARC Equity	-	9.51%	7.57%	7.49%	-	4.58%	5.52%	18.79%	-3.28%	9.28%
Best Ideas (10)	Oct 13	11.96%	9.12%	9.44%	9.33%	6.41%	10.98%	24.39%	-6.46%	15.77%
Low Cost (10)	Nov 15	11.14%	9.51%	-	9.32%	5.81%	7.60%	26.82%	-	-
Positive Impact (10)	Nov 15	13.02%	9.29%	-	9.50%	6.92%	8.44%	22.79%	-	-

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