

PERFORMANCE REPORT - DECEMBER 17



TAVISTOCK PB PROFILES

defaqto 2017		TAVISTOCK PB PROFILE 3					SYNAPTIC RISK RATING 2.9
DFM MPS Direct		Dec 17	YTD	1 yr	3 yr	5 yr	
★★★★★		0.45%	3.19%	3.19%	12.32%	22.71%	
defaqto 2017		TAVISTOCK PB PROFILE 4					SYNAPTIC RISK RATING 2.9
DFM MPS Direct		Dec 17	YTD	1 yr	3 yr	5 yr	
★★★★★		0.53%	4.08%	4.08%	15.96%	28.60%	
defaqto 2017		TAVISTOCK PB PROFILE 5					SYNAPTIC RISK RATING 3.1
DFM MPS Direct		Dec 17	YTD	1 yr	3 yr	5 yr	
★★★★★		0.71%	5.53%	5.53%	19.34%	34.43%	
defaqto 2017		TAVISTOCK PB PROFILE 6					SYNAPTIC RISK RATING 3.4
DFM MPS Direct		Dec 17	YTD	1 yr	3 yr	5 yr	
★★★★★		0.94%	7.43%	7.43%	23.59%	41.97%	
defaqto 2017		TAVISTOCK PB PROFILE 7					SYNAPTIC RISK RATING 4.1
DFM MPS Direct		Dec 17	YTD	1 yr	3 yr	5 yr	
★★★★★		1.23%	9.63%	9.63%	30.85%	56.56%	
defaqto 2017		TAVISTOCK PB PROFILE 8					SYNAPTIC RISK RATING 4.4
DFM MPS Direct		Dec 17	YTD	1 yr	3 yr	5 yr	
★★★★★		1.33%	10.84%	10.84%	33.24%	61.79%	
defaqto 2017		TAVISTOCK PB INCOME					SYNAPTIC RISK RATING 3.2
DFM MPS Direct		Dec 17	YTD	1 yr	3 yr	5 yr	
★★★★★		0.69%	5.23%	5.23%	20.56%	45.53%	

The value of investments held in the ACUMEN Portfolios or Tavistock PB PROFILES may fall as well as rise. Past performance should not be seen as an indication of future performance. The Tavistock PB PROFILES are a white-labelled offering based on the DFM Portfolio Management Service provided by PB Financial Planning; a trading style of Tavistock Private Client Limited, which is a wholly owned subsidiary of Tavistock Investments Plc. Tavistock Private Client is authorised and regulated by the Financial Conduct Authority. The inception date of the PB Financial Planning DFM Portfolio Management Service is 18/02/08. All Tavistock PB PROFILE performance data up until 31/12/16 has been provided by PB Financial Planning and has been calculated using FE Analytics. As of 01/01/17, all Tavistock PB PROFILES invest in a blend of the ACUMEN Portfolio range. All performance data thereafter is provided by Tavistock Wealth Limited. Source of data: PB Financial Planning, Tavistock Wealth Limited, FE Analytics, Thomson Reuters and Lipper for Investment Management unless otherwise stated. Date of data: 31st December 2017.

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ACUMEN PORTFOLIOS

	December 17	YTD	Rolling 1 yr
ACUMEN Bond Portfolio**	0.22%	N/A	N/A
ACUMEN Conservative Portfolio	0.56%	4.53%	4.53%
ACUMEN Income Portfolio*	0.71%	5.33%	5.33%
ACUMEN Progressive Portfolio	1.41%	10.92%	10.92%
ACUMEN Adventurous Portfolio*	1.51%	11.30%	11.30%
ACUMEN Equity Portfolio**	1.58%	N/A	N/A
ACUMEN Strategic Portfolio**	1.31%	N/A	N/A

* Inception date 25th February 2016 ** Inception date 25th June 2017

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