

# Melville Douglas

## Peer Group Performance Update

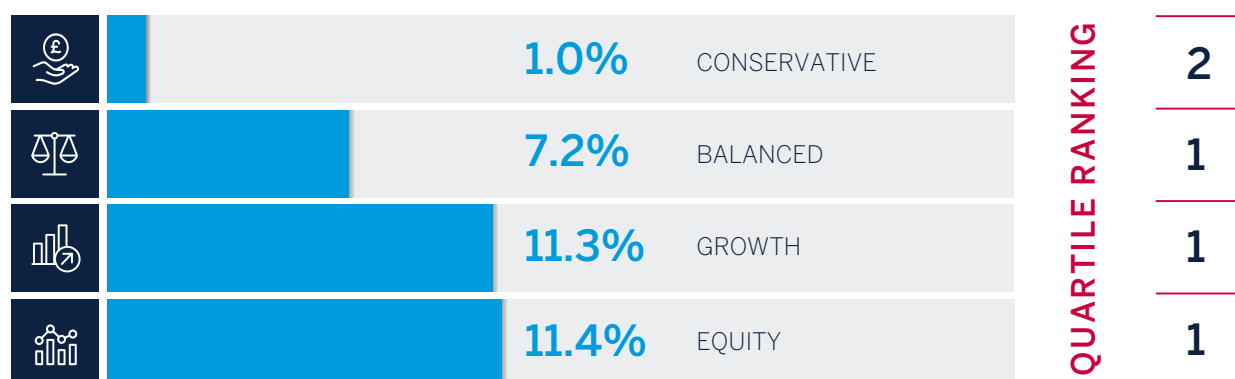
Q4 - 2018

Strong peer group performance once again  
across our portfolio solutions

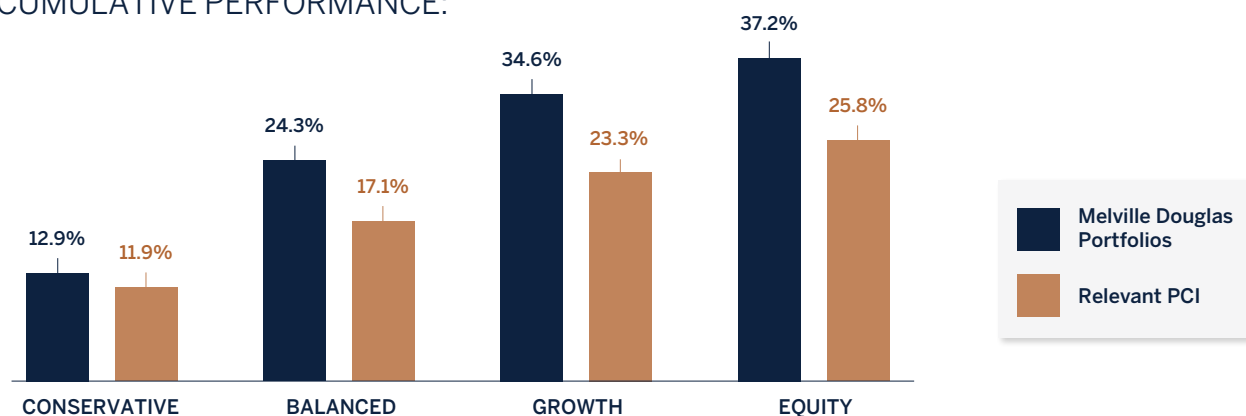
### 5 YEAR PORTFOLIO STRATEGIES

#### 5 YEAR STERLING OUTPERFORMANCE TO PEER GROUP

Three of our 5-year Sterling strategies are ranked in the top quartile

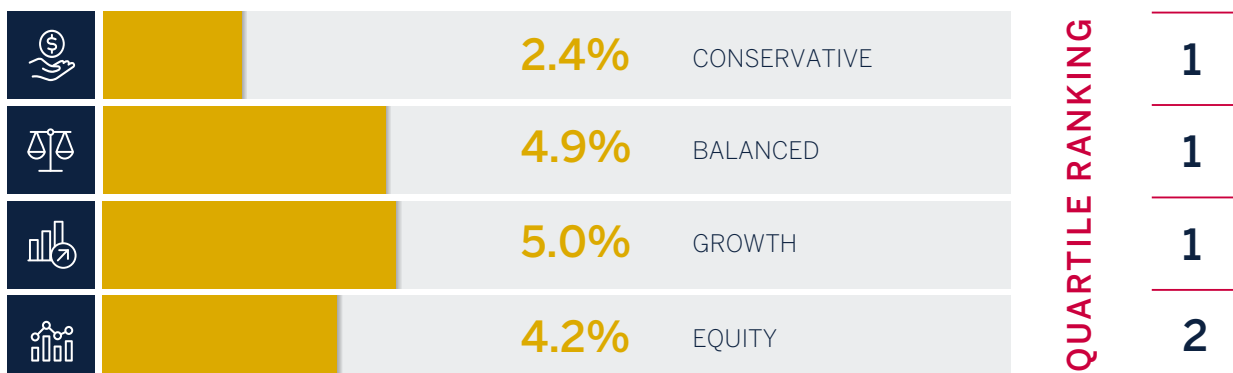


#### CUMULATIVE PERFORMANCE:

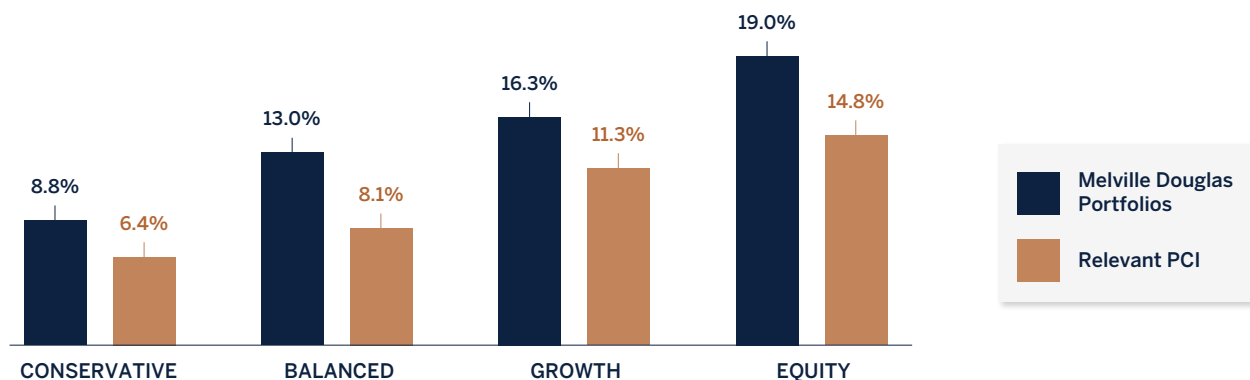


## 5 YEAR US DOLLAR OUTPERFORMANCE TO PEER GROUP

Three of our 5-year US Dollar strategies are ranked in the top quartile



## CUMULATIVE PERFORMANCE:

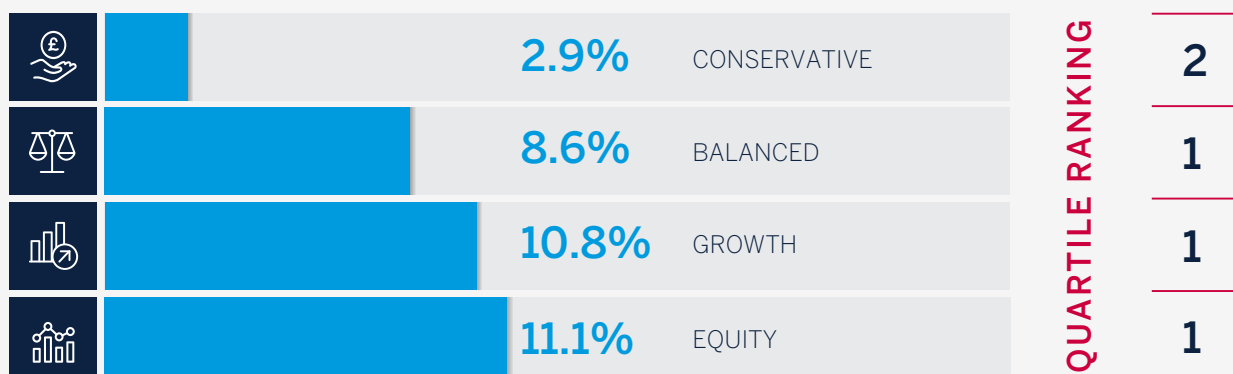


Source: ARC Research Ltd PCI [www.assetrisk.com](http://www.assetrisk.com)

## 3 YEAR PORTFOLIO STRATEGIES

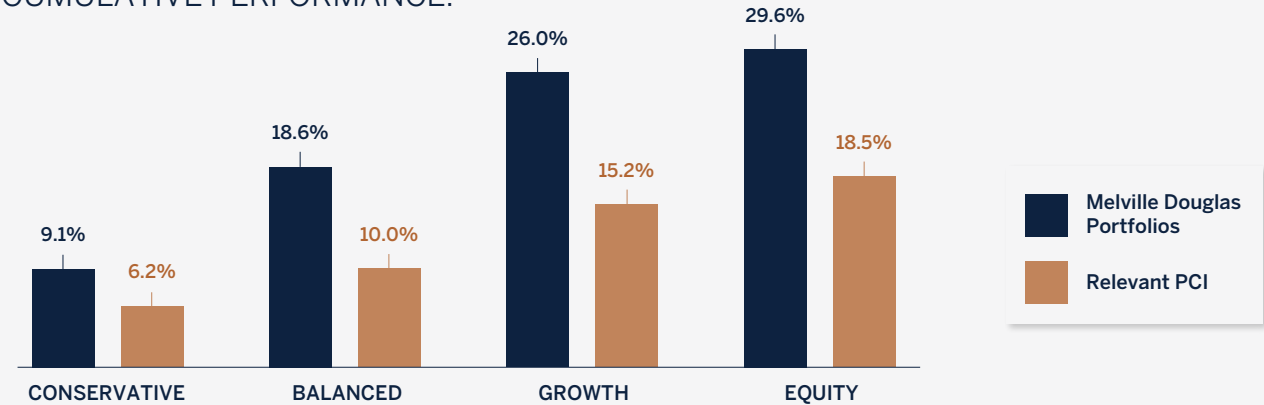
### 3 YEAR STERLING OUTPERFORMANCE TO PEER GROUP

Three of our 3-year Sterling strategies are ranked in the top quartile



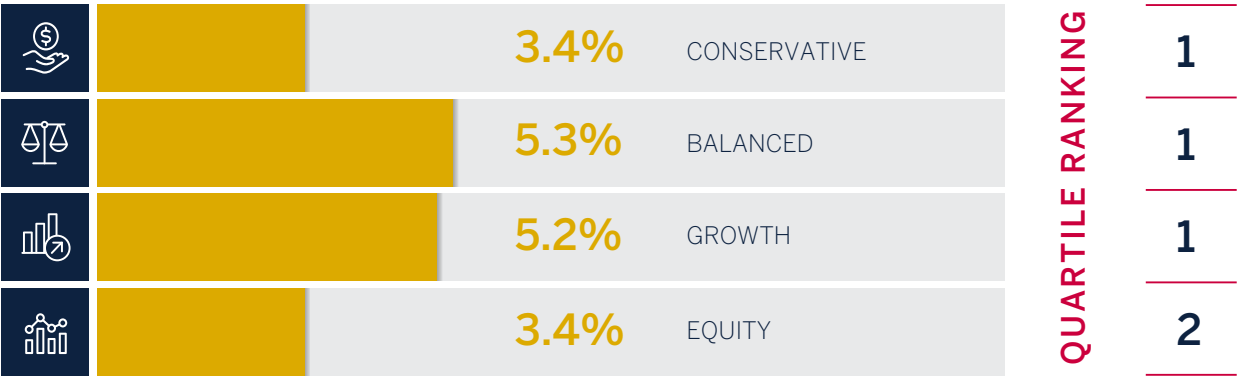


CUMULATIVE PERFORMANCE:

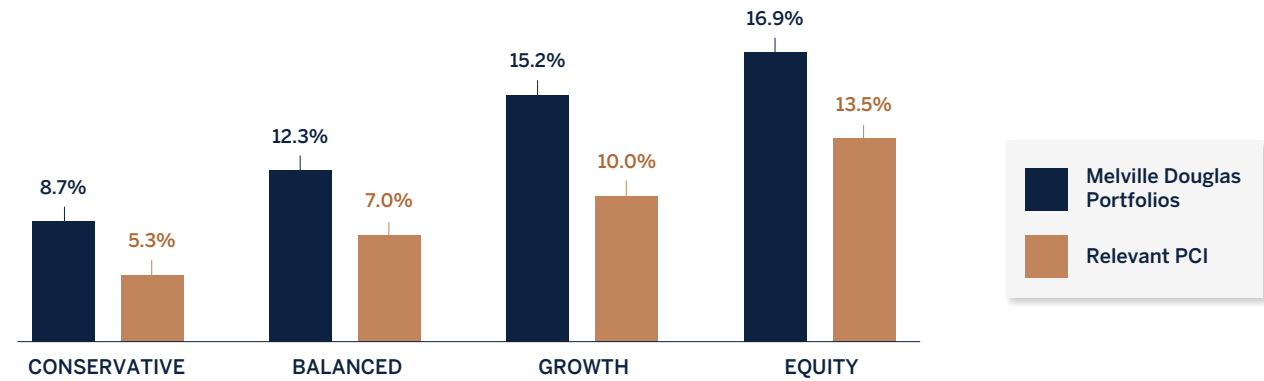


Source: ARC Research Ltd PCI [www.assetrisk.com](http://www.assetrisk.com)

3 YEAR US DOLLAR OUTPERFORMANCE TO PEER GROUP  
Three of our 3-year US Dollar strategies are ranked in the top quartile



CUMULATIVE PERFORMANCE:

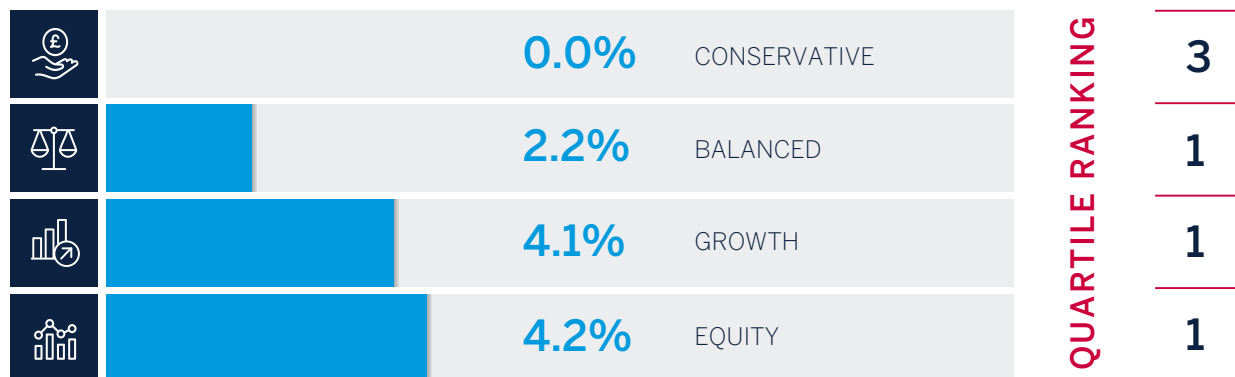


Source: ARC Research Ltd PCI [www.assetrisk.com](http://www.assetrisk.com)

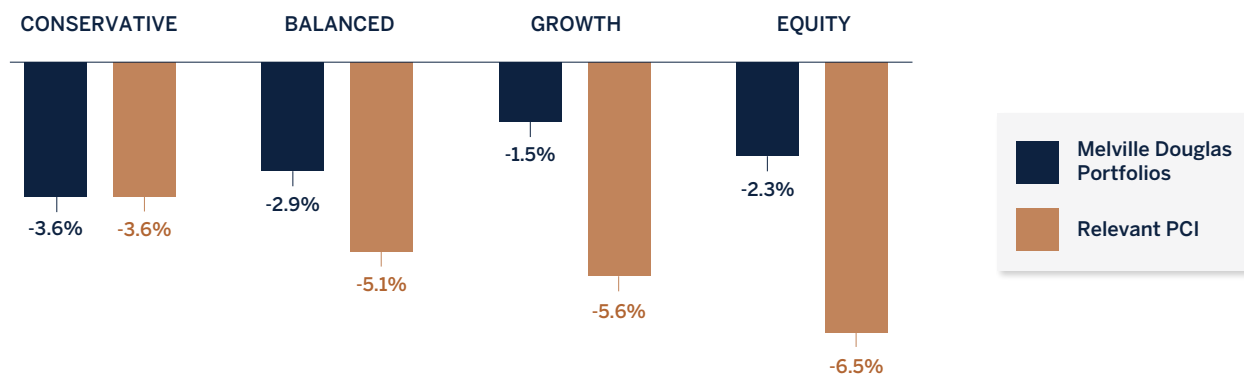
## 1 YEAR PORTFOLIO STRATEGIES

### 1 YEAR STERLING OUTPERFORMANCE TO PEER GROUP

Three of our 1-year Sterling strategies are ranked in the top quartile



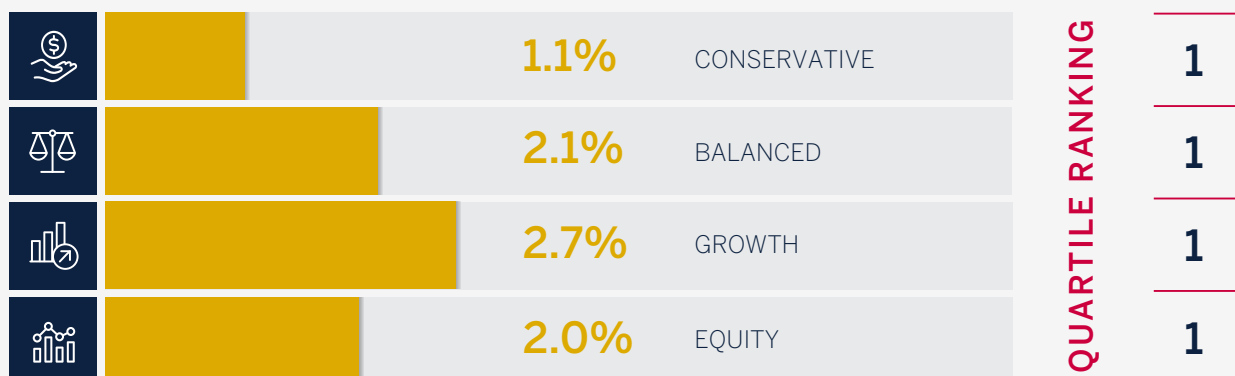
### CUMULATIVE PERFORMANCE:



Source: ARC Research Ltd PCI [www.assetrisk.com](http://www.assetrisk.com)

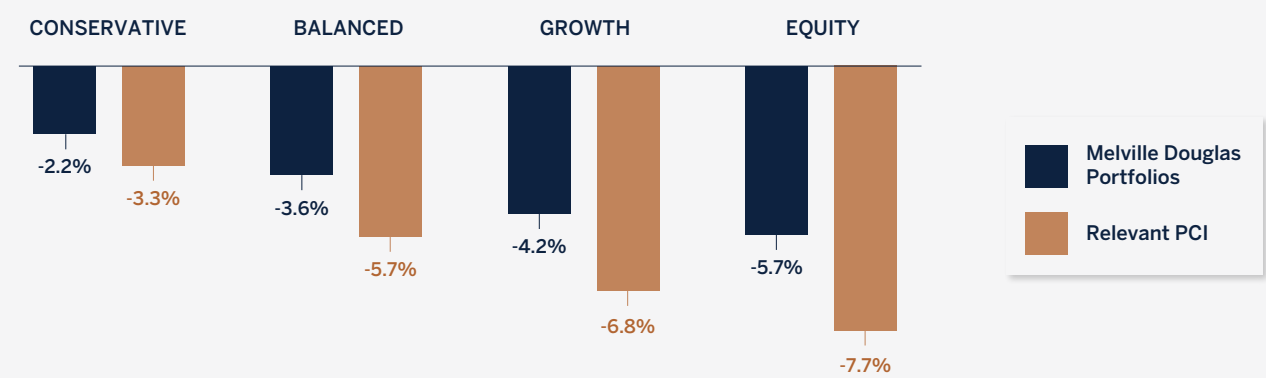
### 1 YEAR US DOLLAR OUTPERFORMANCE TO PEER GROUP

All of our 1-year US Dollar strategies are ranked in the top quartile





CUMULATIVE PERFORMANCE:



Source: ARC Research Ltd PCI [www.assetrisk.com](http://www.assetrisk.com)





# Private Client Indices and Asset Risk Consultants

## WHO ARE ASSET RISK CONSULTANTS?

Formed in 1995, ARC Group ("ARC") provides investment consulting, manager research and performance reporting to private clients, charities, family offices, professional trustees and their trusted advisers. Their industry leading ARC Private Client Indices (PCI) and ARC Charity Indices initiatives provide their clients with unrivalled insight into the investment management community. They employ over 60 consultants, analysts, developers and support staff with offices in London, Guernsey, Jersey and Toronto.

**For further information on ARC:**  
[www.assetrisk.com](http://www.assetrisk.com)

## WHAT IS THE PRIVATE CLIENTS INDICES?

### Peer group comparisons

The ARC Private Client Indices (PCI) give a unique insight into the actual returns being generated by investment managers for their discretionary private client portfolios. The PCI performance series are based on real performance numbers provided by participating investment managers.

PCI provide an accurate reflection of the actual returns that a private client should expect for a given risk appetite. This approach leaves investment managers free to use any and all investment strategies, vehicles and structures in the pursuit of the maximum return per unit of realised volatility.

**For further information on PCI:**  
<https://www.assetrisk.com/research/our-services/#indices-pci>



### PCI PEERS INCLUDE:

- |                   |                    |
|-------------------|--------------------|
| / J.P MORGAN      | / BROOKS MACDONALD |
| / BARCLAYS WEALTH | / VERITAS          |
| / INVESTEC        | / UBS              |

The USD indices comprises 33 data contributors.

The Sterling indices comprises 71 data contributors.

*It's Personal.*

  
**Melville Douglas**  
A Member of Standard Bank Group

This document does not constitute an invitation to buy or the solicitation of an offer to sell securities or to provide any other products or services in any jurisdiction to any person to whom it is unlawful to make such an offer or solicitation, nor should it be construed to constitute any investment advice.

This document has been approved for the purposes of section 21 of the Financial Services & Markets Act 2000 (FSMA) by Standard Advisory London Limited, authorised and regulated by the Financial Conduct Authority. Prospective clients residing in the UK should be aware that the protections provided to clients by the UK regulatory system established under FSMA do not apply to any services or products provided by any entity within the Standard Bank Offshore Group. In particular, clients will not be entitled to compensation from the Financial Services Compensation Scheme, nor will they be entitled to the benefits provided by the Financial Ombudsman Service or other protections to clients under FSMA.

Melville Douglas is a registered business name of Standard Bank International Investments Limited which is regulated by the Jersey Financial Services Commission and registered in Jersey No 110601. Standard Bank House, 47-49 La Motte Street, St Helier, Jersey, JE2 4SZ.

The value of investments may fall as well as rise and investors may get back less cash than originally invested. Prices, values or income may fall against the investors' interests and the performance quoted refers to the past, and past performance is not a reliable indicator of future results. Investments may be quoted in foreign currencies and investors should be aware that the changes in rates of exchange may have adverse effects on the value, price or income of the investments.

RMC2019.027