

# Melville Douglas

## Peer Group Performance Update

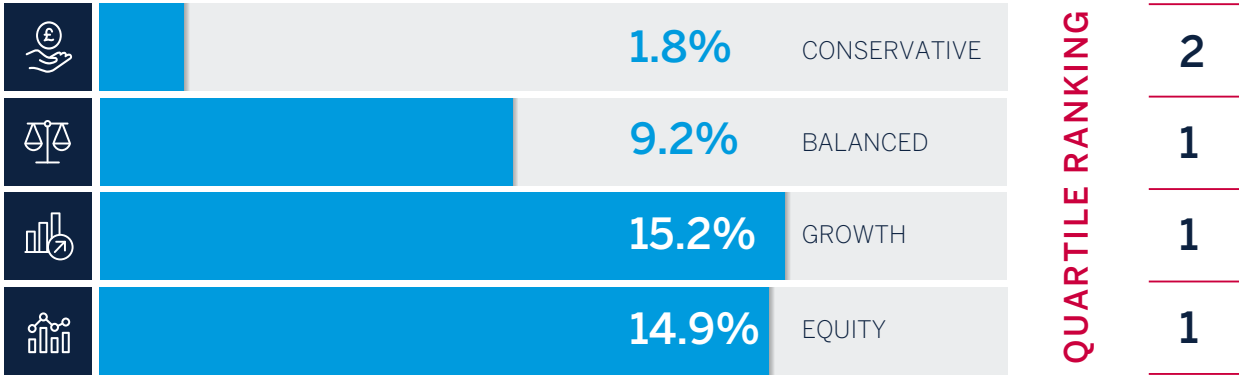
Q1 - 2019

Strong peer group performance across our portfolio solutions.

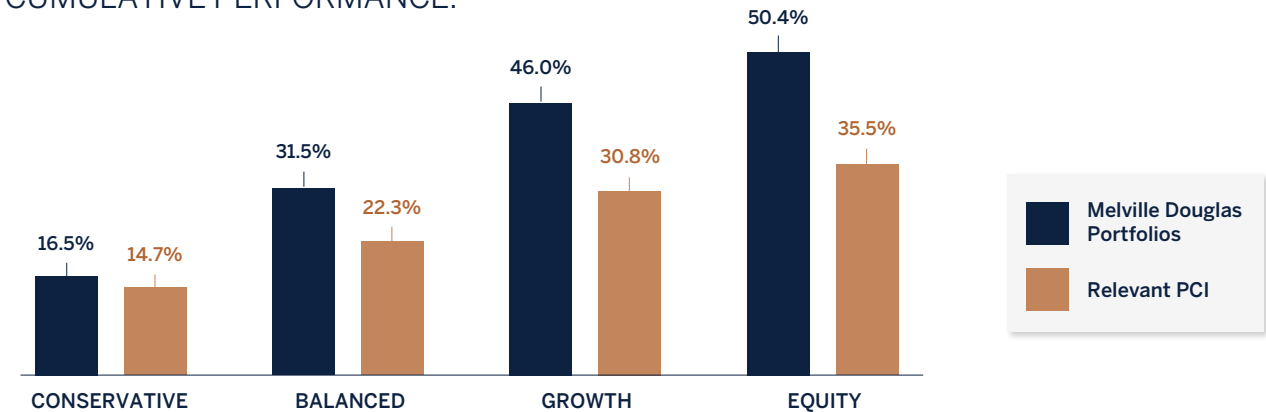
### 5 YEAR PORTFOLIO STRATEGIES

#### 5 YEAR STERLING OUTPERFORMANCE TO PEER GROUP

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



#### CUMULATIVE PERFORMANCE:

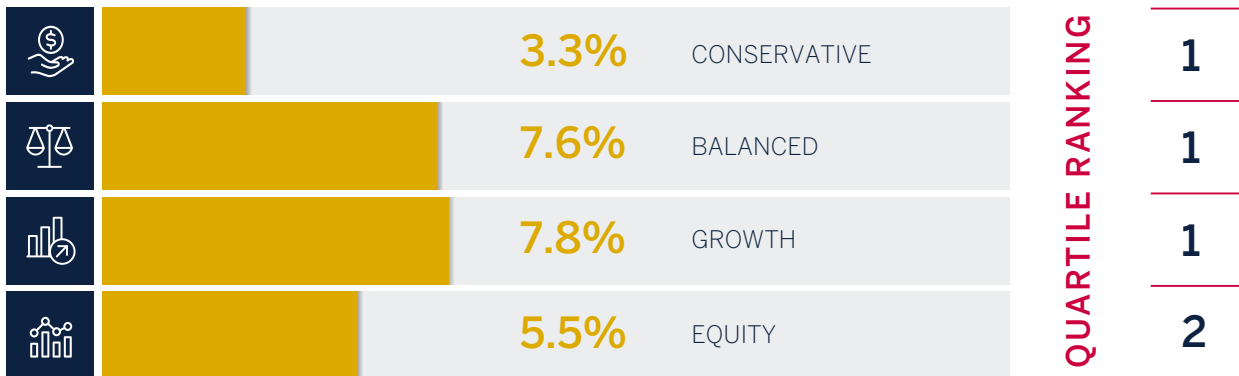


Source: ARC Research Ltd PCI [www.assetrisk.com](http://www.assetrisk.com)

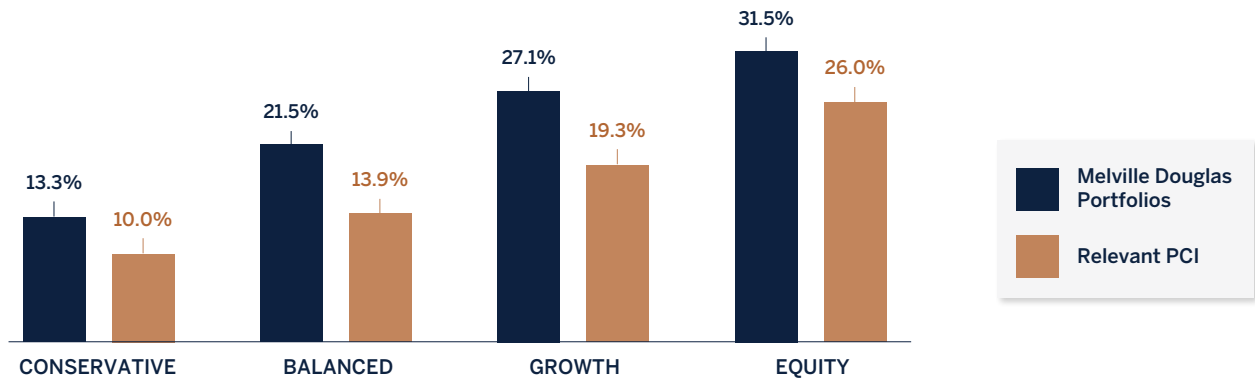


## 5 YEAR US DOLLAR OUTPERFORMANCE TO PEER GROUP

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



## CUMULATIVE PERFORMANCE:

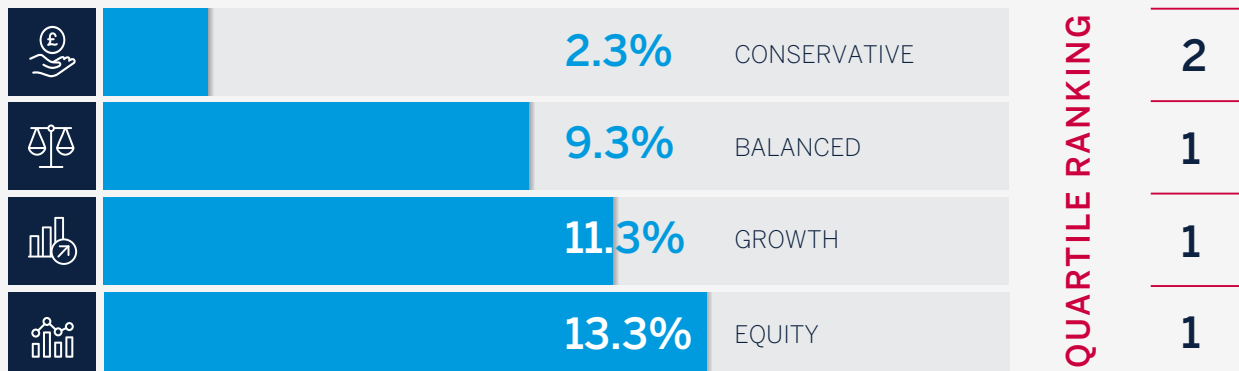


Source: ARC Research Ltd PCI [www.assetrisk.com](http://www.assetrisk.com)

## 3 YEAR PORTFOLIO STRATEGIES

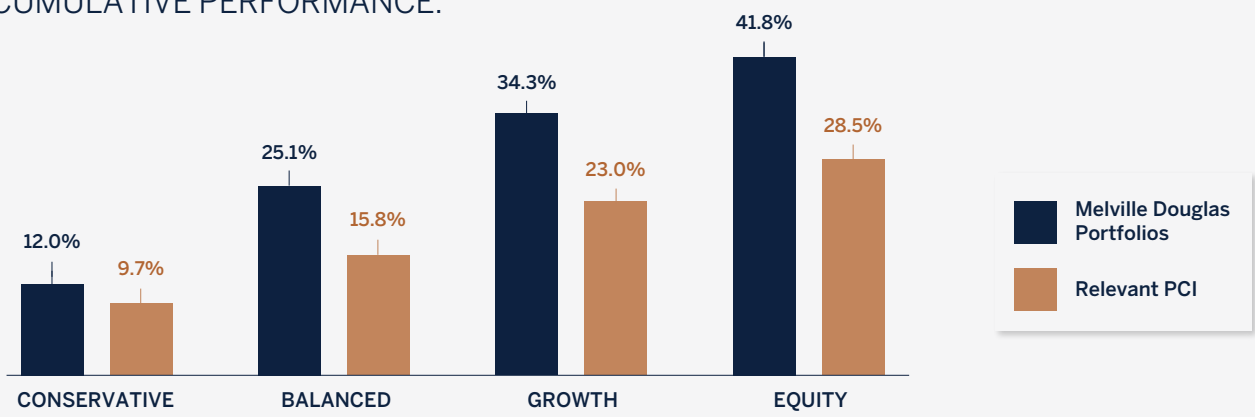
### 3 YEAR STERLING OUTPERFORMANCE TO PEER GROUP

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





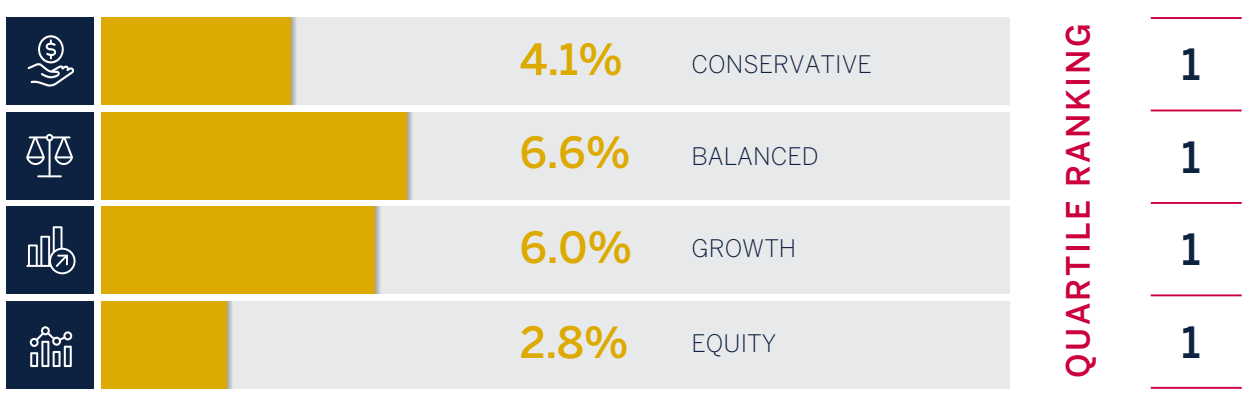
### CUMULATIVE PERFORMANCE:



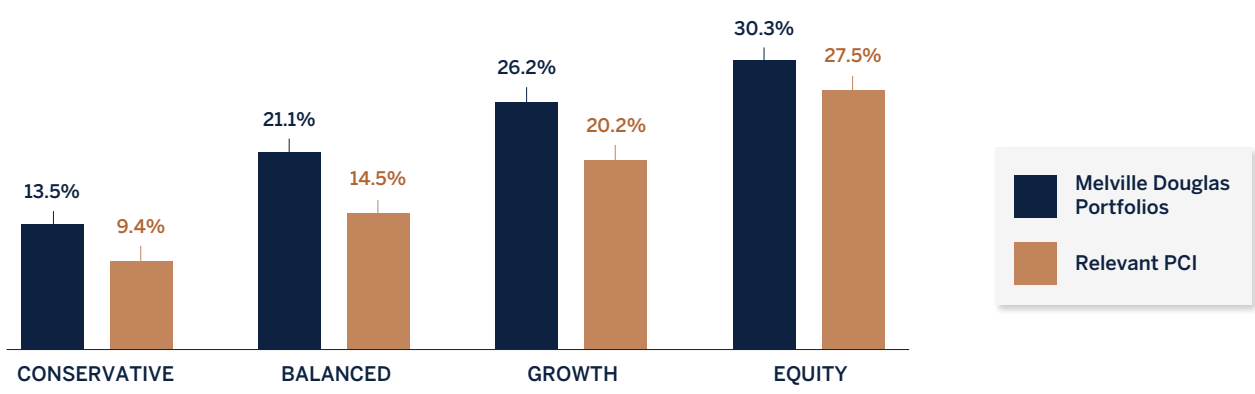
Source: ARC Research Ltd PCI www.assetrisk.com

### 3 YEAR US DOLLAR OUTPERFORMANCE TO PEER GROUP

All of our 3-year US Dollar strategies are ranked in the top quartile



### CUMULATIVE PERFORMANCE:



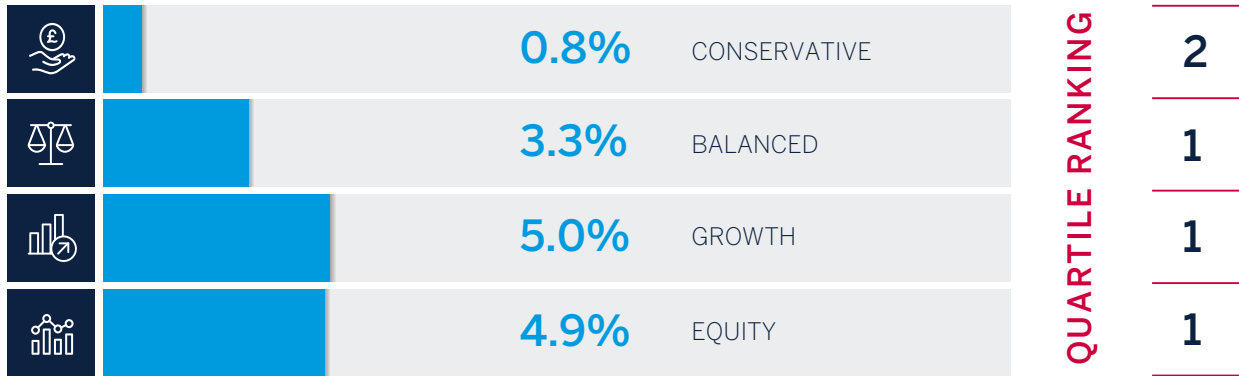
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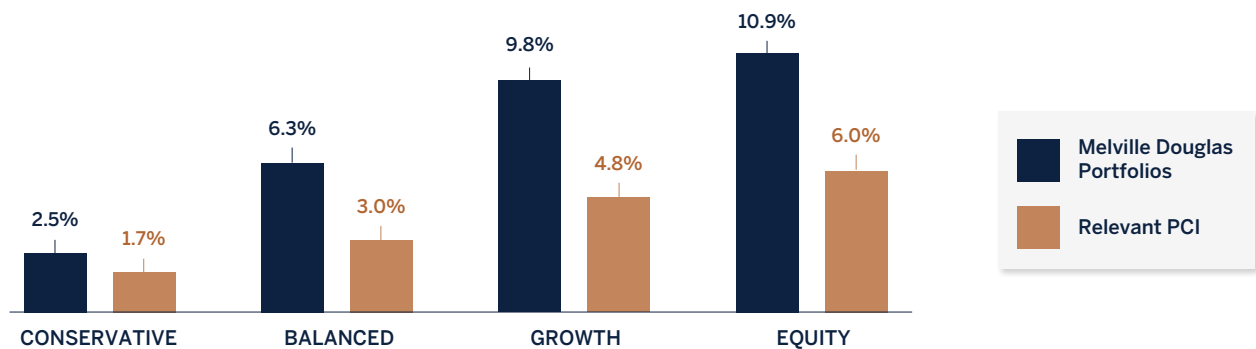
## 1 YEAR PORTFOLIO STRATEGIES

### 1 YEAR STERLING OUTPERFORMANCE TO PEER GROUP

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



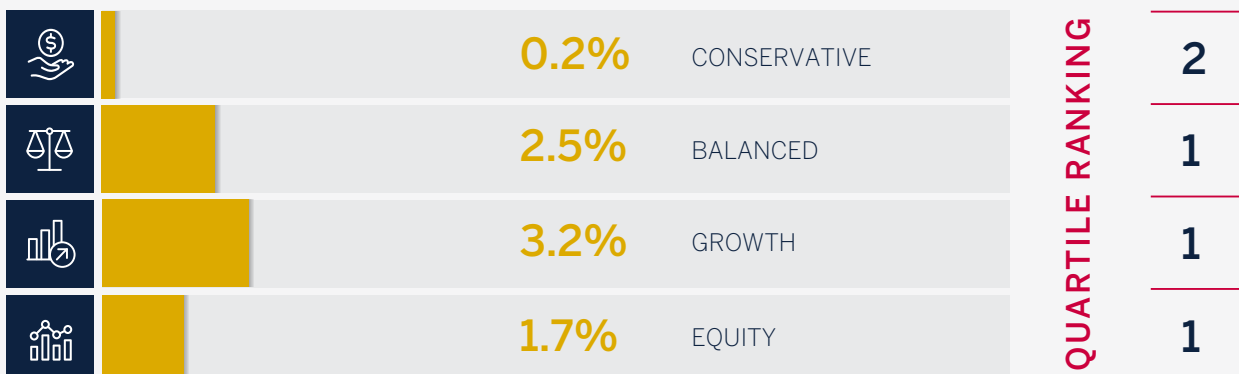
### CUMULATIVE PERFORMANCE:



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

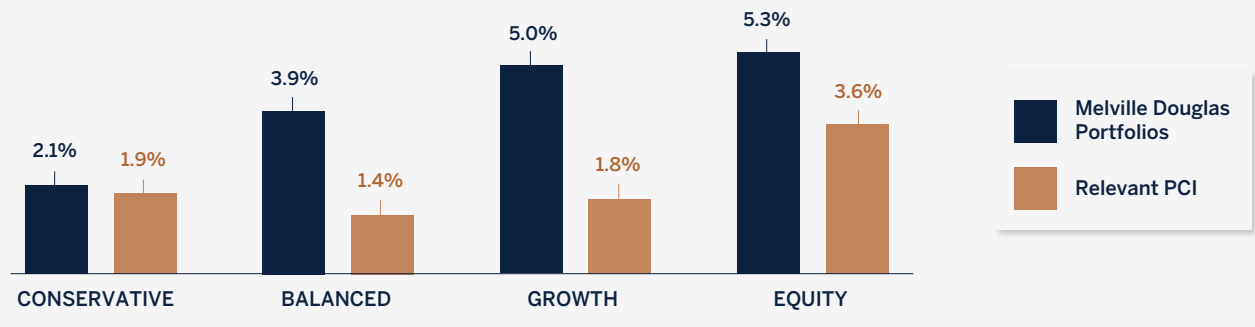
### 1 YEAR US DOLLAR OUTPERFORMANCE TO PEER GROUP

Three 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
- / BARCLAYS WEALTH
- / INVESTEC
- / BROOKS MACDONALD
- / VERITAS
- / UBS

The USD indices comprises 32 data contributors.  
The Sterling indices comprises 74 data contributors.

*It's Personal.*

  
**Melville Douglas**  
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