



**Master Conservative Investment Percentage Growth**

Time Period: 01/04/2016 to 31/03/2026



**Performance (Annualised)**

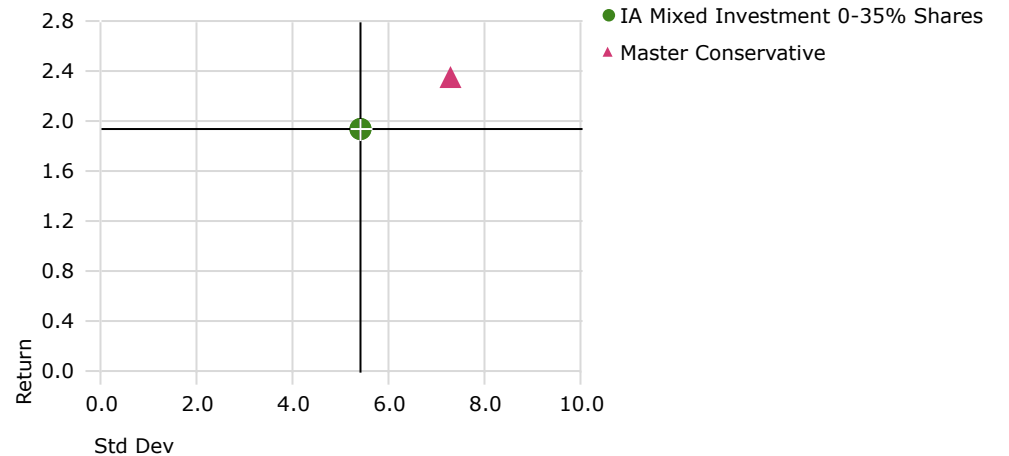
Time Period: 01/04/2021 to 31/03/2026 Calculation Benchmark: None

| Indices                          | Return | Std Dev | Sharpe Ratio | Max Drawdown |
|----------------------------------|--------|---------|--------------|--------------|
| IA Mixed Investment 0-35% Shares | 1.93   | 1.57    | -0.07        | -12.46       |
| Master Conservative              | 2.34   | 2.11    | -0.05        | -16.23       |

**Risk-Reward**

Time Period: 01/04/2021 to 31/03/2026

Calculation Benchmark: None





**Master Balanced Investment Percentage Growth**

Time Period: 01/04/2016 to 31/03/2026



**Performance (Annualised)**

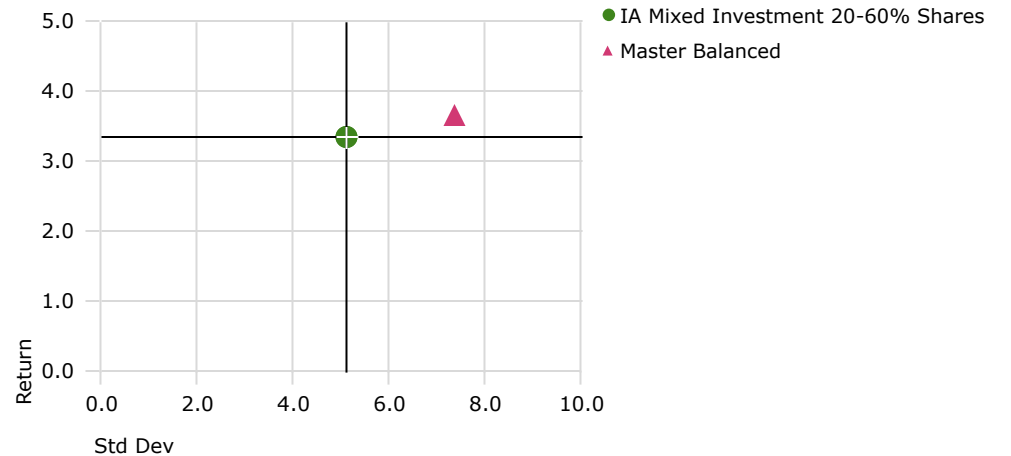
Time Period: 01/04/2021 to 31/03/2026 Calculation Benchmark: None

| Indices                           | Return | Std Dev | Sharpe Ratio | Max Drawdown |
|-----------------------------------|--------|---------|--------------|--------------|
| IA Mixed Investment 20-60% Shares | 3.35   | 1.88    | -0.03        | -12.34       |
| Master Balanced                   | 3.64   | 2.46    | -0.02        | -17.08       |

**Risk-Reward**

Time Period: 01/04/2021 to 31/03/2026

Calculation Benchmark: None





### Master Growth Investment Percentage Growth

Time Period: 01/04/2016 to 31/03/2026



### Performance (Annualised)

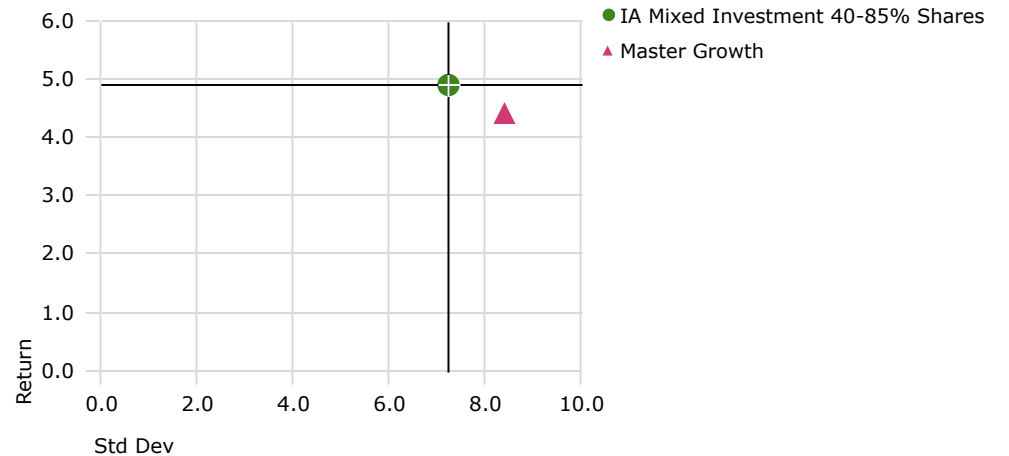
Time Period: 01/04/2021 to 31/03/2026 Calculation Benchmark: None

| Indices                           | Return | Std Dev | Sharpe Ratio | Max Drawdown |
|-----------------------------------|--------|---------|--------------|--------------|
| IA Mixed Investment 40-85% Shares | 4.88   | 2.34    | 0.01         | -12.72       |
| Master Growth                     | 4.40   | 2.80    | 0.00         | -18.38       |

### Risk-Reward

Time Period: 01/04/2021 to 31/03/2026

Calculation Benchmark: None





### Master Aggressive Investment Percentage Growth

Time Period: 01/04/2016 to 31/03/2026



### Performance (Annualised)

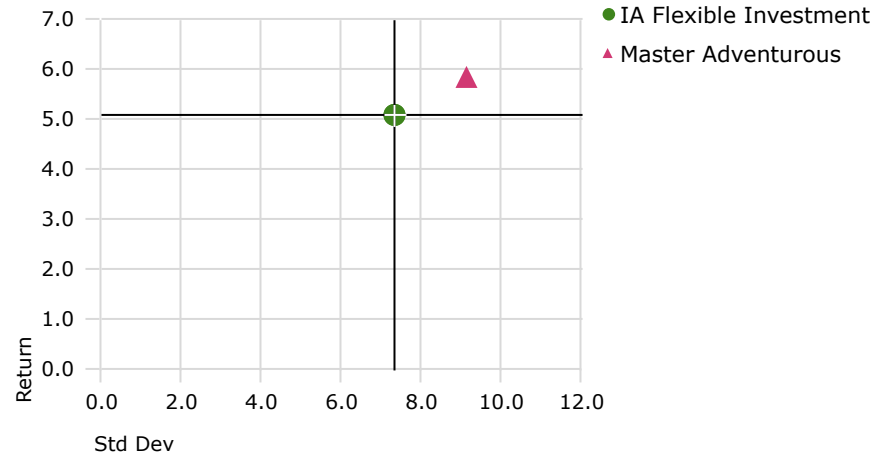
Time Period: 01/04/2021 to 31/03/2026 Calculation Benchmark: None

| Indices                | Return | Std Dev | Sharpe Ratio | Max Drawdown |
|------------------------|--------|---------|--------------|--------------|
| IA Flexible Investment | 5.07   | 2.32    | 0.01         | -11.56       |
| Master Adventurous     | 5.84   | 2.83    | 0.03         | -16.62       |

### Risk-Reward

Time Period: 01/04/2021 to 31/03/2026

Calculation Benchmark: None





**Master Defensive Investment Percentage Growth**

Time Period: 01/04/2021 to 31/03/2026



**Performance (Annualised)**

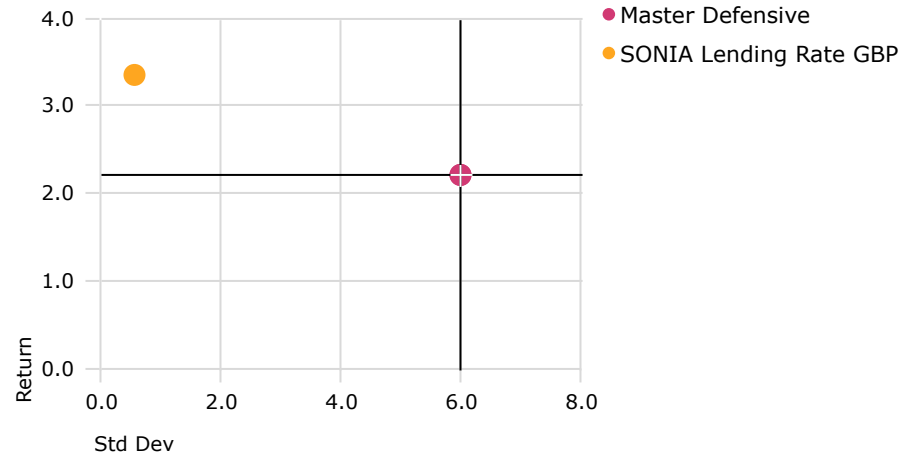
Time Period: 01/04/2021 to 31/03/2026 Calculation Benchmark: None

| Indices                | Return | Std Dev | Sharpe Ratio | Max Drawdown |
|------------------------|--------|---------|--------------|--------------|
| Master Defensive       | 2.22   | 1.73    | -0.06        | -13.41       |
| SONIA Lending Rate GBP | 3.35   | 0.16    | -0.05        |              |

**Risk-Reward**

Time Period: 01/04/2021 to 31/03/2026

Calculation Benchmark: None





## LAM Disclaimer

The information contained in this document is issued by Longley Asset Management (LAM).

Source for all graphs and market data is Morningstar Direct.

The returns are shown net of investment management and internal fund fees.

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