



## Master Conservative Investment Percentage Growth

Time Period: 01/04/2015 to 31/03/2025



### Performance (Annualised)

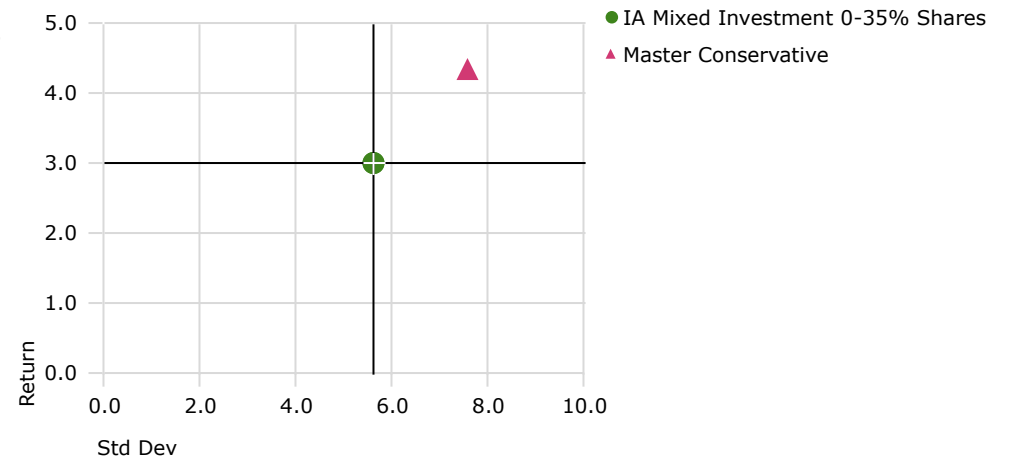
Time Period: 01/04/2020 to 31/03/2025 Calculation Benchmark: None

Indices	Return	Std Dev	Sharpe Ratio	Max Drawdown
IA Mixed Investment 0-35% Shares	3.00	1.62	0.02	-12.46
Master Conservative	4.33	2.19	0.05	-16.23

### Risk-Reward

Time Period: 01/04/2020 to 31/03/2025

Calculation Benchmark: None



## Master Balanced Investment Percentage Growth

Time Period: 01/04/2015 to 31/03/2025



— IA Mixed Investment 20-60% Shares

38.0% — Master Balanced

44.9%

### Performance (Annualised)

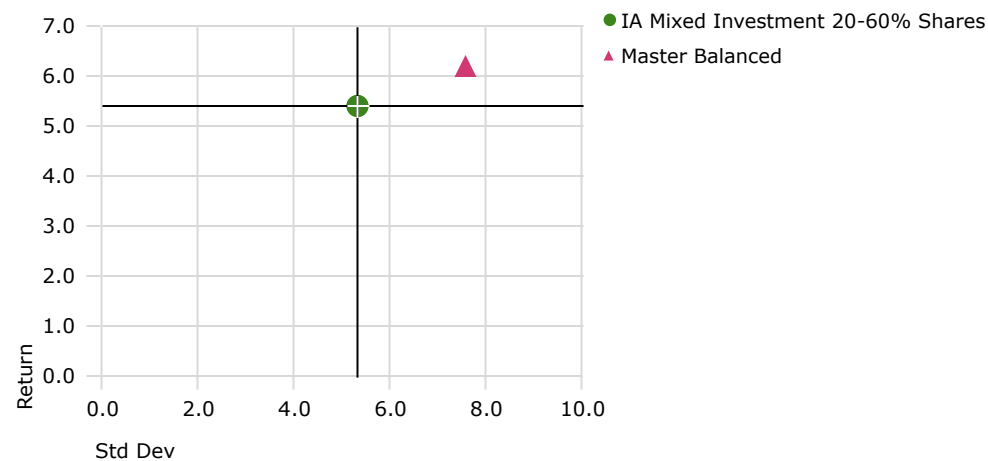
Time Period: 01/04/2020 to 31/03/2025 Calculation Benchmark: None

Indices	Return	Std Dev	Sharpe Ratio	Max Drawdown
IA Mixed Investment 20-60% Shares	5.37	1.99	0.07	-12.34
Master Balanced	6.19	2.55	0.08	-17.08

### Risk-Reward

Time Period: 01/04/2020 to 31/03/2025

Calculation Benchmark: None



## Master Growth Investment Percentage Growth

Time Period: 01/04/2015 to 31/03/2025



IA Mixed Investment 40-85% Shares

61.4% Master Growth

58.9%

### Performance (Annualised)

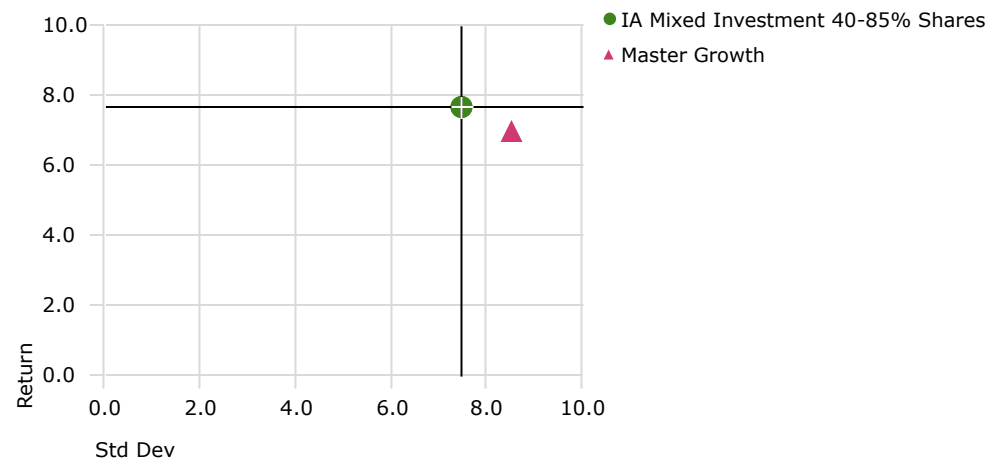
Time Period: 01/04/2020 to 31/03/2025 Calculation Benchmark: None

Indices	Return	Std Dev	Sharpe Ratio	Max Drawdown
IA Mixed Investment 40-85% Shares	7.64	2.47	0.11	-12.72
Master Growth	6.97	2.85	0.09	-18.38

### Risk-Reward

Time Period: 01/04/2020 to 31/03/2025

Calculation Benchmark: None



## Master Aggressive Investment Percentage Growth

Time Period: 01/04/2015 to 31/03/2025



— IA Flexible Investment

64.3% — Master Adventurous

82.8%

### Performance (Annualised)

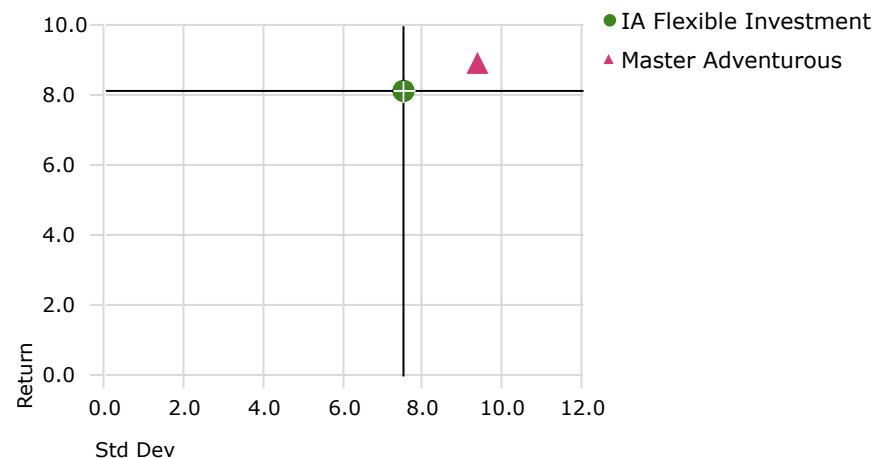
Time Period: 01/04/2020 to 31/03/2025 Calculation Benchmark: None

Indices	Return	Std Dev	Sharpe Ratio	Max Drawdown
IA Flexible Investment	8.12	2.44	0.12	-11.56
Master Adventurous	8.91	2.88	0.12	-16.62

### Risk-Reward

Time Period: 01/04/2020 to 31/03/2025

Calculation Benchmark: None



## Master Defensive Investment Percentage Growth

Time Period: 01/04/2020 to 31/03/2025



IA Mixed Investment 0-35% Shares

15.9% Master Defensive

22.0% SONIA Lending Rate GBP

13.3%

## Performance (Annualised)

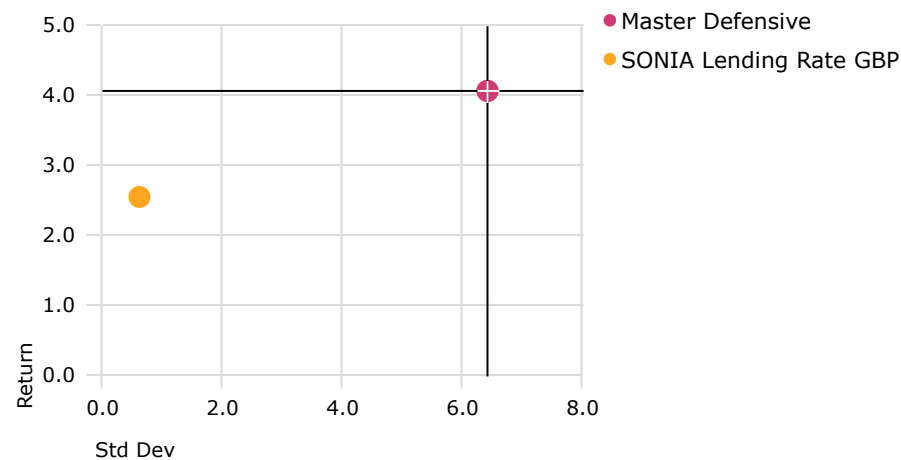
Time Period: 01/04/2020 to 31/03/2025 Calculation Benchmark: None

Indices	Return	Std Dev	Sharpe Ratio	Max Drawdown
Master Defensive	4.05	1.86	0.04	-13.41
SONIA Lending Rate GBP	2.53	0.19	0.01	

## Risk-Reward

Time Period: 01/04/2020 to 31/03/2025

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.

Opinions constitute our judgment as at the date of publication and are subject to change without warning.

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Where an investment involves exposure to foreign currency, changes in the rates of exchange may cause the value of the investment, and the income from it, to go up or down. Commissions and exchange fees are not included.

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