

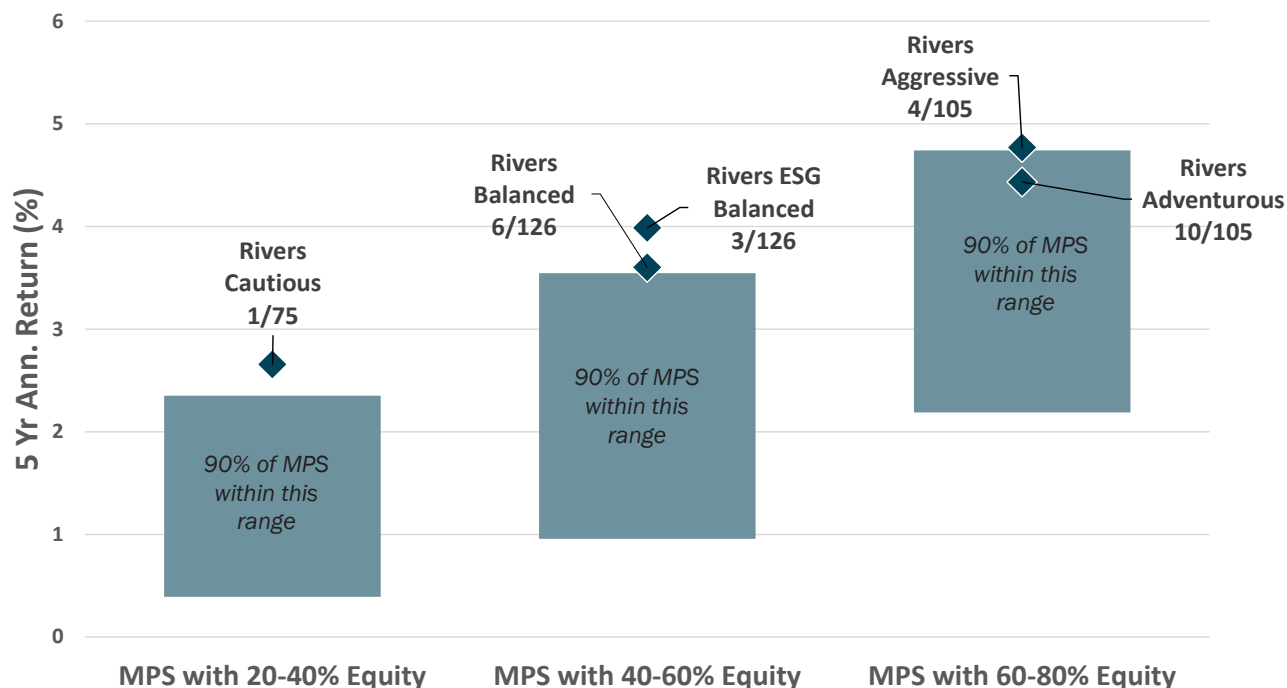
Rivers MPS

December 31st 2022



Data from the Morningstar Managed Portfolio Database for 5 Years to Q4 2022 shows Rivers Model Portfolios to have all ranked highly when compared to other providers of the same risk rating

Annualised 5 year Return to 31st December 2022



Source: Morningstar.co.uk MPS Data Screener Q4 2022. All Model Portfolios with 5 year data within the same categorisation as Rivers MPS were evaluated. For illustrative purposes the best and worst 5% within each category have not been shown leaving the range of 90% of MPS solutions. Past performance provides no indication of future returns.

Data at 31 st December 2022	2022	3 Year Return Ann.	5 Year Return Ann.	Volatility	MPS Fee (incl VAT)	Portfolio average OCF
Rivers Cautious Growth Model	-4.6%	2.3%	2.7%	7.4%	0.25%	0.55%
IA Mixed Investment 0% - 35% Shares	-10.9%	-1.6%	0.0%	7.4%		
Rivers Balanced Growth Model	-5.4%	3.1%	3.6%	11.3%	0.25%	0.54%
Rivers ESG Balanced Model	-10.9%	3.5%	4.0%	11.6%	0.25%	0.67%
IA Mixed Investment 20%-60% Shares	-9.5%	0.2%	1.3%	9.9%		
Rivers Adventurous Growth Model	-5.9%	4.4%	4.4%	10.2%	0.25%	0.55%
Rivers Aggressive Growth Model	-6.1%	4.6%	4.8%	12.0%	0.25%	0.61%
IA Mixed Investment 40% - 85% Shares	-10.0%	1.7%	2.7%	12.0%		
IA Flexible Investment	-9.0%	2.6%	3.1%	11.8%		

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