



NOVEMBER 2014

Ben Raven – Head of Proposition

Performance Report – November 2014

Acumen Portfolios, Tavistock Acumen Profiles and Tavistock Only Profiles

CIP Portfolio	Risk Profile	Nov	Inception to Date*	Portfolio Benchmark	Nov	Inception to Date*
ACUMEN CONSERVATIVE PORTFOLIO	3.5	2.40%	4.05%	IMA Mixed Investment 20%-60% Shares	2.39%	1.90%
ACUMEN PROGRESSIVE PORTFOLIO	7.5	2.55%	4.61%	IMA Mixed Investment 40%-85% Shares	3.14%	2.29%
TAVISTOCK ACUMEN PROFILE 3	3	2.21%	3.73%	IMA Mixed Investment 0%-35% Shares	1.81%	1.77%
TAVISTOCK ACUMEN PROFILE 4	4	2.40%	4.05%	IMA Mixed Investment 20%-60% Shares	2.39%	1.90%
TAVISTOCK ACUMEN PROFILE 5	5	2.46%	4.27%	IMA Mixed Investment 20%-60% Shares	2.39%	1.90%
TAVISTOCK ACUMEN PROFILE 6	6	2.49%	4.39%	IMA Mixed Investment 40%-85% Shares	3.14%	2.29%
TAVISTOCK ACUMEN PROFILE 7	7	2.35%	4.24%	IMA Mixed Investment 40%-85% Shares	3.40%	2.24%
TAVISTOCK ACUMEN PROFILE 8	8	2.55%	4.61%	IMA Flexible Investment	3.40%	2.24%
TAVISTOCK PROFILE 3	3	1.92%	3.14%	IMA Mixed Investment 0%-35% Shares	1.81%	1.77%
TAVISTOCK PROFILE 4	4	2.21%	3.41%	IMA Mixed Investment 20%-60% Shares	2.39%	1.90%
TAVISTOCK PROFILE 5	5	2.46%	3.48%	IMA Mixed Investment 20%-60% Shares	2.39%	1.90%
TAVISTOCK PROFILE 6	6	2.44%	3.35%	IMA Mixed Investment 40%-85% Shares	3.14%	2.29%
TAVISTOCK PROFILE 7	7	2.49%	3.47%	IMA Flexible Investment	3.14%	2.29%
TAVISTOCK PROFILE 8	8	2.53%	3.46%	IMA Flexible Investment	3.40%	2.24%

Source of data: Tavistock Wealth Limited and Financial Express

Date of data: December 2014

*Inception date: 1st October 2014

This Document Is For Use By Advisers Only. It Should Not Be Relied On By A Retail Client. The value of investments held in the Centralised Investment Proposition may fall as well as rise. Past performance should not be seen as an indication of future performance.

5 Victoria Street, Windsor, Berkshire SL4 1HB United Kingdom
www.tavistockwealth.com call : + 44 (0)1753 867000

Tavistock Wealth Limited is authorised and regulated by the Financial Conduct Authority
 Tavistock Wealth Limited is a wholly owned subsidiary of Tavistock Investments Plc

OUR VALUES AND YOU. ALTOGETHER GREATER.



NOVEMBER 2014

Ben Raven – Head of Proposition

Tavistock Partner Profiles

DFM Portfolio	Risk Profile	Nov	Inception to Date*
TAVISTOCK ARJENT 3	3	2.09%	3.26%
TAVISTOCK ARJENT 4	4	2.50%	3.90%
TAVISTOCK ARJENT 6	6	2.68%	4.04%
TAVISTOCK ARJENT 8	8	2.77%	4.36%
TAVISTOCK BORDIER 3	3	2.11%	3.13%
TAVISTOCK BORDIER 4	4	2.33%	3.34%
TAVISTOCK BORDIER 5	5	2.46%	3.52%
TAVISTOCK BORDIER 6	6	2.67%	3.66%
TAVISTOCK BORDIER 7	7	2.86%	3.87%
TAVISTOCK KLEINWORT BENSON 4	4	2.06%	3.51%
TAVISTOCK KLEINWORT BENSON 6	6	2.43%	3.90%
TAVISTOCK KLEINWORT BENSON 7	7	2.81%	4.19%
TAVISTOCK KLEINWORT BENSON 8	8	3.01%	4.13%
TAVISTOCK NEWSCAPE 3	3	1.85%	2.89%
TAVISTOCK NEWSCAPE 4	4	2.03%	3.10%
TAVISTOCK NEWSCAPE 5	5	2.27%	3.42%
TAVISTOCK NEWSCAPE 6	6	2.25%	3.43%
TAVISTOCK NEWSCAPE 7	7	2.16%	3.43%

*Inception date: 1st October 2014

Source of data: Tavistock Wealth Limited and Financial Express

Date of data: 28th November 2014

Source of data: Tavistock Wealth Limited and DFM Partners

Date of data: December 2014

This Document Is For Use By Advisers Only. It Should Not Be Relied On By A Retail Client. The value of investments held in the Centralised Investment Proposition may fall as well as rise. Past performance should not be seen as an indication of future performance.