Concentric Analytics Limited

Performance & Risk Comparison

31/10/2026

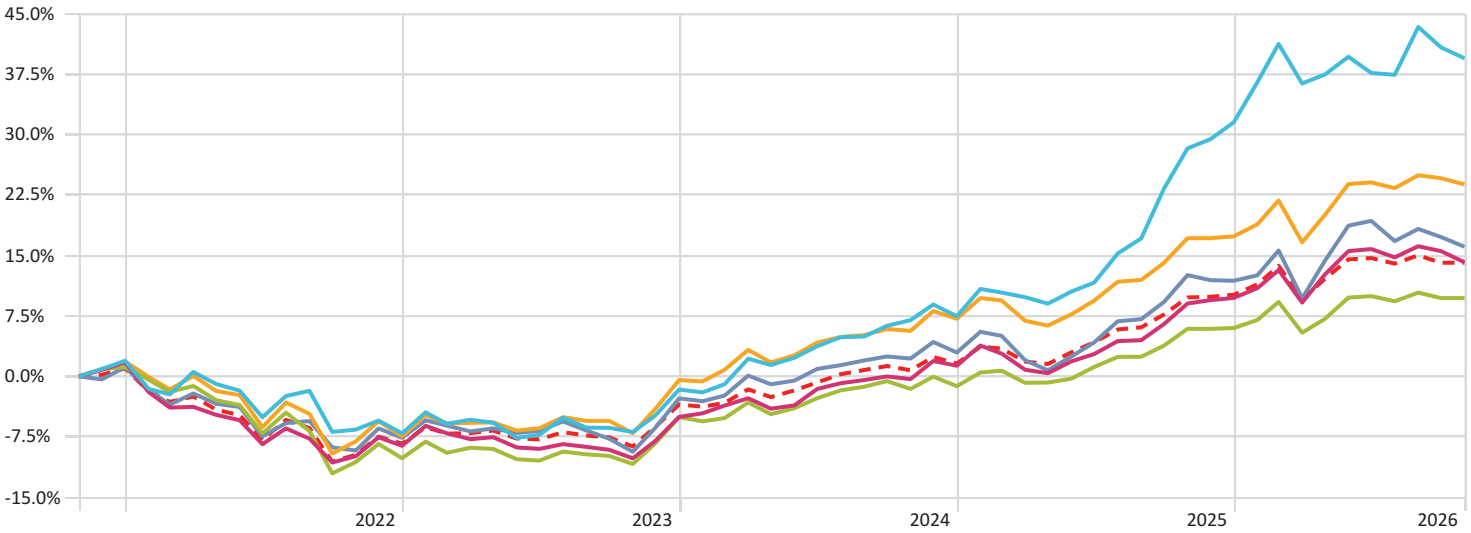
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Yearly Returns

	YTD	2025	2024	2023	2022
TEAM MA Conservative	6.04	22.40	9.25	5.86	-8.84
Pacific Defensive Global	3.50	7.31	4.05	5.68	-11.19
Pacific Conservative Global	5.50	9.54	7.64	7.55	-9.14
LGT WM Int. GBP Cautious	4.03	8.31	6.69	3.92	-10.17
Marlborough Cautious X	3.77	8.65	5.86	5.29	-8.65
MPI Low Risk TR GBP	3.62	8.40	5.26	5.32	-9.26

5 Year - Investment Growth

Time Period: 01/11/2021 to 31/10/2026



TEAM MA Conservative	39.5%	Pacific Defensive Global	9.7%	Pacific Conservative Global	23.8%
LGT WM Int. GBP Cautious	14.2%	Marlborough Cautious X	16.1%	MPI Low Risk TR GBP	14.1%

Annualised Returns

	1 Year	2 Years	3 Years	4 Years	5 Years
TEAM MA Conservative	8.71	14.18	14.43	10.55	6.88
Pacific Defensive Global	3.60	5.57	7.17	5.26	1.87
Pacific Conservative Global	5.70	8.27	10.03	7.73	4.37
LGT WM Int. GBP Cautious	4.70	7.03	8.32	6.10	2.68
Marlborough Cautious X	3.13	6.57	8.60	6.34	3.03
MPI Low Risk TR GBP	3.93	6.42	7.72	6.03	2.68

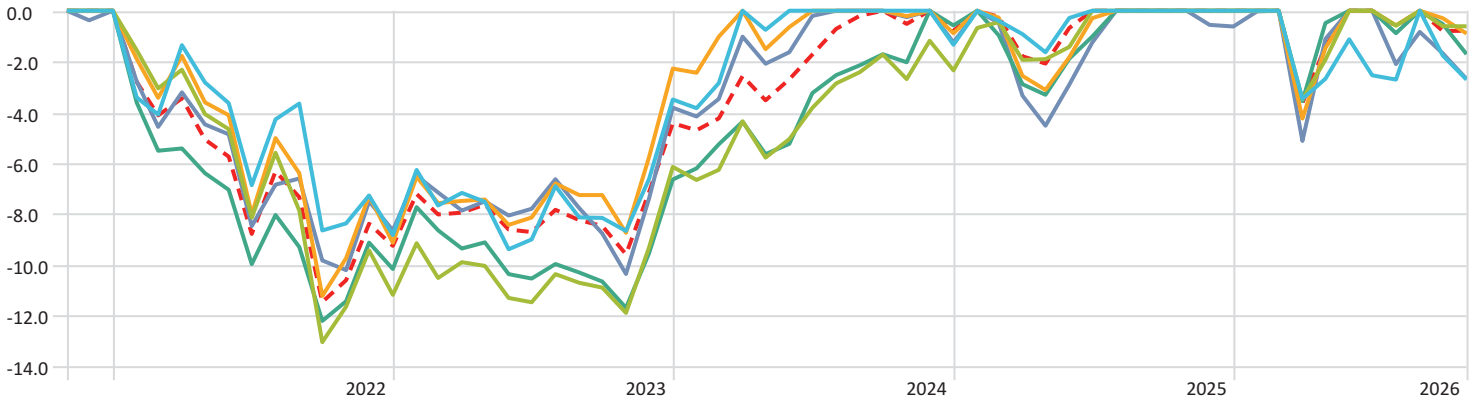
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5 Year - Drawdown

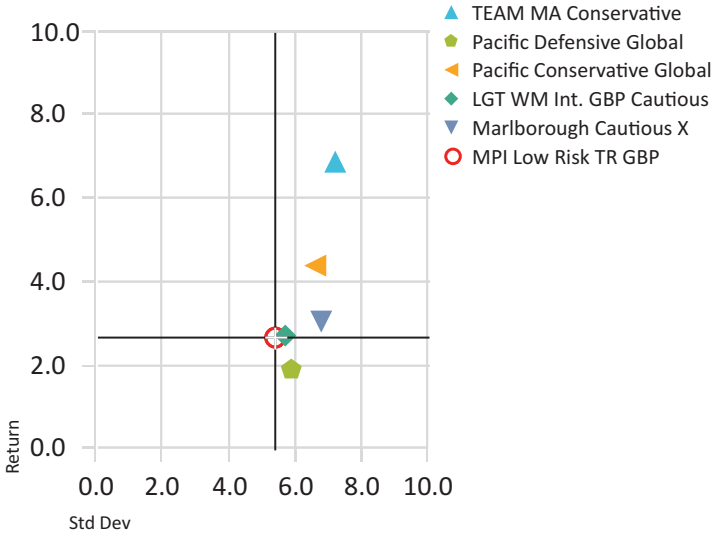


TEAM MA Conservative
Pacific Defensive Global
Pacific Conservative Global
LGT WM Int. GBP Cautious
Marlborough Cautious X
MPI Low Risk TR GBP

5 Year - Risk-Reward

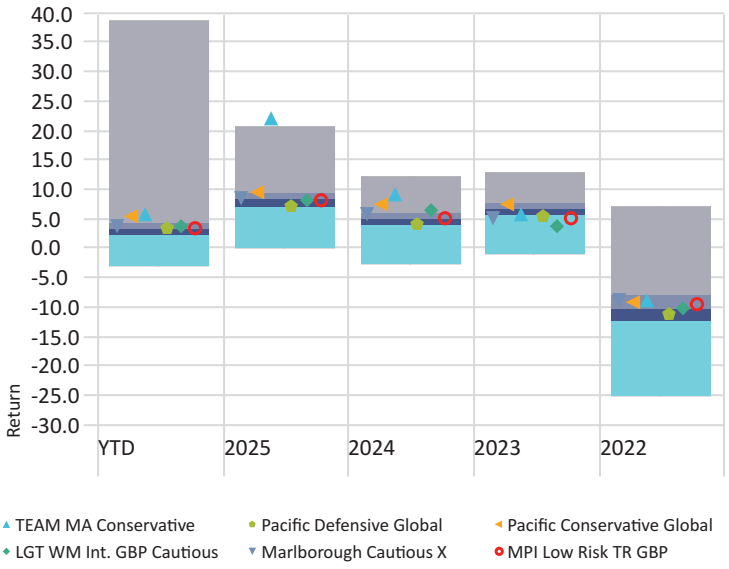
Time Period: 01/11/2021 to 31/10/2026

Calculation Benchmark: MPI Low Risk TR GBP



Performance Relative to Peer Group

Peer Group (1-100%): Open End Funds - Europe/Africa/Asia - GBP Allocation 20-40% Equity Calculation Benchmark: MPI Low Risk TR GBP



5 Year - Risk

Time Period: 01/11/2021 to 31/10/2026

	Return	Cumulative Return	Std Dev	Sharpe Ratio	Beta	Max Drawdown
TEAM MA Conservative	6.88	39.47	7.25	0.45	1.15	-9.39
Pacific Defensive Global	1.87	9.72	5.91	-0.30	1.06	-13.05
Pacific Conservative Global	4.37	23.83	6.61	0.12	1.21	-11.24
LGT WM Int. GBP Cautious	2.68	14.17	5.73	-0.17	1.01	-12.22
Marlborough Cautious X	3.03	16.09	6.81	-0.08	1.18	-10.37
MPI Low Risk TR GBP	2.68	14.11	5.42	-0.18	1.00	-11.47