

Ultimate Buy & Hold Equity Portfolio Performance

	S&P 500	+ US LCV	+ US SCB	+ US SCV	+ US REITs	+ Int'l	+ EM	All Value
1970 - 2015 (46 years) (with YEARLY rebalancing)	Portfolio 1	Portfolio 2	Portfolio 3	Portfolio 4	Portfolio 5	Portfolio 6	Portfolio 7	Portfolio 8
Initial \$100,000 Portfolio Grew to:	\$5,859,979	\$6,946,224	\$7,399,214	\$8,819,731	\$9,319,507	\$12,611,816	\$13,645,527	\$21,950,359
Annualized Compound Rate of Return	9.25%	9.66%	9.81%	10.23%	10.36%	11.09%	11.28%	12.43%
Annual Standard Deviation	17.30%	16.44%	16.59%	16.75%	16.48%	17.21%	17.96%	20.55%
Difference from Portfolio 1	0	\$1,086,245	\$1,539,236	\$2,959,752	\$3,459,528	\$6,751,837	\$7,785,548	\$16,090,380

Ultimate Buy & Hold Equity Portfolio Asset Class Allocation

Portfolio	S&P 500	US LCV	US SCB	US SCV	US REITS	Int'l LCB	Int'l LCV	Int'l SCB	Int'l SCV	EM	EM S+V
#1	100%										
#2	90%	10%									
#3	80%	10%	10%								
#4	70%	10%	10%	10%							
#5	60%	10%	10%	10%	10%						
#6	20%	10%	10%	10%	10%	10%	10%	10%	10%		
#7	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	
#8		25%		25%			20%		20%		10%

Notes: Int'l LCV data available only since 1/1975, US REIT data available only since 1/1978,
Int'l SCV data available only since 7/1981, EM data available only since 1/1989.

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