

Ultimate Buy and Hold Equity (50% US / 50% Int'l) Portfolio Tables for 2017

	World-Wide Equity Portfolio Build-Up ----->							All-Value Portfolio
	S&P 500	+ US LCV	+ US SCB	+ US SCV	+ US REITs	+ Int'l	+ EM	
1970 - 2016 (47 years) (with YEARLY rebalancing)	Portfolio 1	Portfolio 2	Portfolio 3	Portfolio 4	Portfolio 5	Portfolio 6	Portfolio 7	Portfolio 8
Initial \$100,000 Grew to:	\$6,502,240	\$7,755,705	\$8,347,061	\$10,093,331	\$10,631,943	\$14,127,436	\$15,324,293	\$23,200,276
Annualized Compound Return	9.3%	9.7%	9.9%	10.3%	10.4%	11.1%	11.3%	12.3%
Annualized Standard Deviation	17.1%	16.3%	16.4%	16.6%	16.3%	17.0%	17.8%	17.8%
Difference from Portfolio 1	0	\$1,253,466	\$1,844,821	\$3,591,091	\$4,129,703	\$7,625,196	\$8,822,053	\$16,698,036

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Note: 1.0% Management Fee subtracted from all portfolios.

Ultimate Buy & Hold Equity Portfolio Asset Class Allocation

Portfolio	S&P 500	US LCV	US SCB	US SCV	REIT	Intl LCB	Intl LCV	Intl SCB	Intl SCV	Em Mrkt
#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%

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