Standard Life Wealth

Performance

For investment professionals only.

Standard Life Wealth creates and manages personal investment portfolios which are tailored to meet our clients' individual financial goals.

Our teams of analysts monitor and select investments from across the whole market and draw on sophisticated investment strategies which aim to provide a reliable investment performance and so increase the certainty of meeting client goals.

Each month we compare our performance against the UK equity market and all the key private client indices run by The Association of Private Client Investment Managers and Stockbrokers (APCIMS).

APCIMS describe their Private Investor Indices as a set of calculations which illustrate the kind of returns that investors might expect from their portfolios. They are, of course, only indicative, but they do provide a useful perspective on the world of stocks and shares and on the performance of client portfolios.

There are three Private Investor Indices, to reflect the differing aims of investors:

- The income portfolio is for those seeking a steady income from their investments;
- The growth portfolio is for investors seeking capital growth;
- The balanced portfolio is for those seeking a balance of income and capital growth.

Each of these portfolios contains different proportions of UK shares, international shares, bonds and cash to reflect the investment aims.

This comparative information is published by Standard Life Wealth each month, as part of our commitment to openness and transparency.

The current comparisons for **31/07/2008** to **31/12/2011** are shown in the table below:

Standard Life Wealth medium risk portfolio	**26.2%**
FTSE All-Share	17.7%
APCIMS Income	24.1%
APCIMS Balanced	20.6%
APCIMS Growth	18.0%

The data in the illustration shows the representative performance of a SLW medium risk portfolio targeting a Libor +3% return after fees and charges.

The indices are the APCIMS and FTSE All Share and the data shown is for the period (31/07/2008 to 31/12/2011). The APCIMS and FTSE index returns do not include fees.

Warning: Past performance is not a guide to future performance.

Find out more

To discuss Standard Life Wealth in more detail, please contact us:

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Standard Life Wealth Limited (SC317950), Discretionary Investment Manager, registered in Scotland at 1 George Street, Edinburgh EH2 2LL, and Standard Life Savings Limited (SC180203), ISA Plan Manager, registered in Scotland at Standard Life House, 30 Lothian Road, Edinburgh EH1 2DH, are both authorised and regulated by the Financial Services Authority.

Call 0845 279 8880 for Standard Life Wealth and 0845 279 2002 for Standard Life Savings. *Calls may be recorded/monitored and call charges may vary.* **www.standardlifewealth.com**

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