

4-Fund Combo Equity Portfolio Tables (100% US / 00% Int'l)

	4-Fund Combo Equity Portfolio Build-Up ----->			
	S&P 500	+ US LCV	+ US SCB	+ US SCV
1970 - 2019 (50 years) (with YEARLY rebalancing)	Portfolio 1	Portfolio 2	Portfolio 3	Portfolio 4
Initial \$100,000 Grew to:	\$15,378,660	\$19,380,935	\$22,478,374	\$32,549,356
Annualized Compound Return	10.6%	11.1%	11.4%	12.3%
Annualized Standard Deviation	17.0%	16.8%	17.4%	18.7%
Difference from Portfolio 1	0	\$4,002,275	\$7,099,714	\$17,170,696

Note: Index returns reduced by the equivalent of a representative fund's expense ratio.

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	4-Fund Combo Equity Portfolio Build-Up ----->			
	S&P 500	+ US LCV	+ US SCB	+ US SCV
1970 - 2019 (50 years) (with MONTHLY rebalancing)	Portfolio 1	Portfolio 2	Portfolio 3	Portfolio 4
Initial \$100,000 Grew to:	\$15,378,660	\$19,244,156	\$22,276,869	\$32,068,755
Annualized Compound Return	10.6%	11.1%	11.4%	12.2%
Annualized Standard Deviation	16.7%	17.0%	17.8%	19.2%
Difference from Portfolio 1	0	\$3,865,495	\$6,898,209	\$16,690,094

Note: Index returns reduced by the equivalent of a representative fund's expense ratio.

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4-Fund Combo Equity Portfolio Asset Class Allocation

Portfolio	S&P 500	US LCV	US SCB	US SCV
#1	100%			
#2	75%	25%		
#3	50%	25%	25%	
#4	25%	25%	25%	25%

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