



STERLING MODEL PORTFOLIO PERFORMANCE - MARCH 2021

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD	Q1	Q2	Q3	Q4	Since Launch	CAGR*
CAUTIOUS PORTFOLIO																			
2017	-0.14%	2.10%	0.54%	0.09%	1.46%	-0.57%	0.00%	0.70%	-0.63%	0.53%	0.13%	0.37%	4.66%	2.51%	0.98%	0.07%	1.04%		
2018	-0.43%	-1.16%	-0.77%	0.12%	0.45%	-0.53%	1.61%	0.70%	-0.54%	-1.26%	-0.13%	-1.38%	-3.28%	-2.33%	0.04%	1.78%	-2.74%		
2019	1.91%	1.35%	1.69%	1.15%	-0.28%	1.61%	1.75%	0.64%	0.17%	-0.41%	0.88%	0.28%	11.23%	5.03%	2.48%	2.57%	0.75%		
2020	0.97%	-1.31%	-6.83%	3.94%	1.91%	1.25%	0.91%	0.39%	0.18%	-1.01%	3.27%	1.00%	4.33%	-7.15%	7.24%	1.49%	3.25%		
2021	-0.63%	-0.90%	1.28%										-0.26%	-0.26%				59.42%	5.17%
BALANCED PORTFOLIO																			
2017	0.33%	3.21%	0.98%	0.00%	2.58%	-0.39%	0.68%	1.58%	-1.48%	1.58%	0.18%	0.73%	10.35%	4.56%	2.18%	0.76%	2.50%		
2018	0.41%	-0.81%	-1.70%	0.99%	1.99%	-0.10%	1.50%	1.28%	-0.29%	-3.13%	1.40%	-2.79%	-1.41%	-2.10%	2.90%	2.50%	-4.51%		
2019	2.87%	1.82%	1.83%	1.40%	-0.16%	2.32%	2.69%	-0.62%	-0.75%	-0.92%	0.81%	0.58%	12.43%	6.66%	3.59%	1.29%	0.46%		
2020	0.90%	-2.59%	-6.75%	5.14%	2.84%	1.58%	0.74%	0.70%	0.14%	-0.93%	4.29%	1.97%	7.74%	-8.35%	9.83%	1.59%	5.36%		
2021	-0.98%	-1.09%	0.91%										-1.17%	-1.17%				117.53%	8.76%
GROWTH PORTFOLIO																			
2017	0.83%	3.57%	1.51%	-0.14%	3.03%	-0.35%	0.86%	1.68%	-1.59%	2.05%	0.25%	0.67%	12.99%	6.01%	2.53%	0.93%	3.00%		
2018	0.78%	-1.18%	-2.73%	2.22%	2.14%	-0.60%	2.21%	1.08%	-0.71%	-4.47%	2.68%	-4.25%	-3.14%	-3.12%	3.79%	2.58%	-6.09%		
2019	3.42%	1.96%	2.11%	2.74%	-0.59%	2.99%	4.15%	-2.21%	-0.51%	-1.70%	1.35%	0.60%	15.02%	7.67%	5.19%	1.33%	0.22%		
2020	0.38%	-4.08%	-10.28%	8.03%	4.35%	2.02%	0.06%	1.60%	1.00%	-1.11%	6.11%	2.52%	9.74%	-13.61%	15.00%	2.68%	7.58%		
2021	-1.26%	-0.83%	1.34%										-0.77%	-0.77%				138.77%	9.87%
GLOBAL BLUE CHIP PORTFOLIO																			
2017	0.92%	6.14%	1.33%	-0.83%	3.43%	-1.29%	-0.42%	2.72%	-3.45%	2.16%	-0.45%	0.31%	10.73%	8.54%	1.25%	-1.24%	2.02%		
2018	-2.71%	-2.88%	-1.53%	1.40%	3.92%	2.13%	5.99%	2.57%	0.07%	-2.91%	2.32%	-4.77%	3.05%	-6.95%	7.61%	8.79%	-5.40%		
2019	0.73%	2.80%	4.77%	2.84%	-0.39%	5.56%	4.17%	0.05%	-0.12%	-3.33%	2.54%	0.23%	21.32%	8.49%	8.13%	4.09%	-0.65%		
2020	0.57%	-5.19%	-3.34%	6.94%	5.34%	0.48%	-3.02%	2.84%	1.35%	-4.30%	7.65%	1.90%	10.69%	-7.83%	13.18%	1.07%	4.98%		
2021	-1.67%	-0.74%	5.14%										2.62%	2.62%				190.40%	12.22%

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*The compound annual growth rate ("CAGR") is the mean annual return of the respective strategies since inception.