

Bongiorno's Performance Tables November 2024

MDA Diversified Portfolios – November 2024

	3 Months	6 Months	1 Year	2 Years (p.a.)	3 Years (p.a.)	Since Inception
Bongiornos MDA Conservative	1.06	4.52	8.02	4.66	0.88	2.74
Peer Group	1.36	3.21	7.46	4.98	1.98	3.10
Inflation	0.25	1.40	2.93	3.86	4.93	3.54
Outperformance Vs Peers	-0.30	1.31	0.56	-0.33	-1.11	-0.36
Outperformance Vs Inflation	0.81	3.12	5.09	0.80	-4.05	-0.80

	3 Months	6 Months	1 Year	2 Years (p.a.)	3 Years (p.a.)	Since Inception
Bongiornos MDA Moderate	1.84	5.55	10.39	6.09	2.19	4.21
Peer Group	1.79	5.02	9.70	6.03	2.45	3.88
Inflation	0.25	1.40	2.93	3.86	4.93	3.54
Outperformance Vs Peers	0.05	0.53	0.68	0.06	-0.26	0.34
Outperformance Vs Inflation	1.59	4.16	7.46	2.23	-2.73	0.68

	3 Months	6 Months	1 Year	2 Years (p.a.)	3 Years (p.a.)	Since Inception
Bongiornos MDA Balanced	2.92	7.00	13.79	8.15	3.66	5.97
Peer Group	3.08	6.66	13.58	8.29	4.25	5.99
Inflation	0.25	1.40	2.93	3.86	4.93	3.54
Outperformance Vs Peers	-0.16	0.34	0.21	-0.14	-0.59	-0.02
Outperformance Vs Inflation	2.67	5.60	10.86	4.28	-1.27	2.43

	3 Months	6 Months	1 Year	2 Years (p.a.)	3 Years (p.a.)	Since Inception
Bongiornos MDA Growth	3.97	8.41	16.91	9.93	5.03	7.59
Peer Group	4.04	7.96	16.92	10.25	5.47	7.63
Inflation	0.25	1.40	2.93	3.86	4.93	3.54
Outperformance Vs Peers	-0.06	0.44	-0.01	-0.32	-0.44	-0.03
Outperformance Vs Inflation	3.72	7.01	13.98	6.07	0.10	4.05

	3 Months	6 Months	1 Year	2 Years (p.a.)	3 Years (p.a.)	Since Inception
Bongiornos MDA Aggressive	4.78	9.43	19.19	11.30	6.06	8.80
Peer Group	5.06	9.80	20.26	12.61	6.97	9.24
Inflation	0.25	1.40	2.93	3.86	4.93	3.54
Outperformance Vs Peers	-0.28	-0.36	-1.07	-1.31	-0.90	-0.44
Outperformance Vs Inflation	4.53	8.04	16.26	7.44	1.14	5.26

MDA Direct Portfolios – November 2024

	3 Months	6 Months	1 Year	2 Years (p.a.)	3 Years (p.a.)	Since Inception
Bongiornos Direct Conservative	1.08	4.49	7.95	4.59	1.01	2.71
Peer Group	1.36	3.21	7.46	4.98	1.98	3.10
Inflation	0.25	1.40	2.93	3.86	4.93	3.54
Outperformance Vs Peers	-0.28	1.28	0.49	-0.40	-0.97	-0.39
Outperformance Vs Inflation	0.83	3.10	5.02	0.72	-3.92	-0.82

	3 Months	6 Months	1 Year	2 Years (p.a.)	3 Years (p.a.)	Since Inception
Bongiornos Direct Moderate	1.88	5.54	10.31	6.01	2.36	4.09
Peer Group	1.79	5.02	9.70	6.03	2.45	3.88
Inflation	0.25	1.40	2.93	3.86	4.93	3.54
Outperformance Vs Peers	0.09	0.52	0.61	-0.01	-0.10	0.21
Outperformance Vs Inflation	1.63	4.14	7.38	2.15	-2.57	0.55

	3 Months	6 Months	1 Year	2 Years (p.a.)	3 Years (p.a.)	Since Inception
Bongiornos Direct Balanced	2.99	6.94	13.57	7.94	3.91	5.73
Peer Group	3.08	6.66	13.58	8.29	4.25	5.99
Inflation	0.25	1.40	2.93	3.86	4.93	3.54
Outperformance Vs Peers	-0.09	0.28	-0.01	-0.34	-0.34	-0.27
Outperformance Vs Inflation	2.74	5.54	10.64	4.08	-1.02	2.19

	3 Months	6 Months	1 Year	2 Years (p.a.)	3 Years (p.a.)	Since Inception
Bongiornos Direct Growth	4.08	8.32	16.58	9.62	5.43	7.27
Peer Group	4.04	7.96	16.92	10.25	5.47	7.63
Inflation	0.25	1.40	2.93	3.86	4.93	3.54
Outperformance Vs Peers	0.04	0.35	-0.34	-0.62	-0.04	-0.35
Outperformance Vs Inflation	3.83	6.92	13.65	5.76	0.50	3.73

	3 Months	6 Months	1 Year	2 Years (p.a.)	3 Years (p.a.)	Since Inception
Bongiornos Direct Aggressive	4.91	9.3	18.75	10.90	6.52	8.39
Peer Group	5.06	9.8	20.26	12.61	6.97	9.24
Inflation	0.25	1.4	2.93	3.86	4.93	3.54
Outperformance Vs Peers	-0.15	-0.5	-1.51	-1.72	-0.44	-0.85
Outperformance Vs Inflation	4.66	7.9	15.82	7.04	1.60	4.85

ESG Portfolios – November 2024

	3 Months	6 Months	1 Year	2 Years (p.a.)	Since Inception
Bongiornos ESG Conservative	1.04	4.32	8.77	5.25	3.86
Peer Group	1.36	3.21	7.46	4.98	2.38
Inflation	0.25	1.40	2.93	3.86	5.01
Outperformance Vs Peers	-0.32	1.10	1.32	0.26	1.47
Outperformance Vs Inflation	0.79	2.92	5.84	1.39	-1.16

	3 Months	6 Months	1 Year	2 Years (p.a.)	Since Inception
Bongiornos ESG Moderate	1.68	5.08	11.02	6.67	5.14
Peer Group	1.79	5.02	9.70	6.03	2.95
Inflation	0.25	1.40	2.93	3.86	5.01
Outperformance Vs Peers	-0.11	0.05	1.32	0.64	2.19
Outperformance Vs Inflation	1.43	3.68	8.09	2.81	0.13

	3 Months	6 Months	1 Year	2 Years (p.a.)	Since Inception
Bongiornos ESG Balanced	2.81	6.94	15.61	9.31	7.31
Peer Group	3.08	6.66	13.58	8.29	5.01
Inflation	0.25	1.40	2.93	3.86	5.01
Outperformance Vs Peers	-0.27	0.28	2.03	1.02	2.30
Outperformance Vs Inflation	2.56	5.55	12.68	5.45	2.30

	3 Months	6 Months	1 Year	2 Years (p.a.)	Since Inception
Bongiornos ESG Growth	3.89	8.53	19.55	11.52	9.12
Peer Group	4.04	7.96	16.92	10.25	6.39
Inflation	0.25	1.40	2.93	3.86	5.01
Outperformance vs Peers	-0.14	0.56	2.63	1.27	2.72
Outperformance vs Inflation	3.64	7.13	16.62	7.66	4.11

	3 Months	6 Months	1 Year	2 Years (p.a.)	Since Inception
Bongiornos ESG Aggressive	4.75	9.69	22.57	13.33	10.57
Peer Group	5.06	9.80	20.26	12.61	8.08
Inflation	0.25	1.40	2.93	3.86	5.01
Outperformance Vs Peers	-0.31	-0.11	2.31	0.72	2.50
Outperformance Vs Inflation	4.50	8.29	19.64	9.47	5.56



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