

# Two Dial Hypothetical Illustration



Keep  
Dial Setting

+20%

Greater than 12% return

The investment is placed in the 'Keep' Zone when its return exceeds the average return of its respective benchmark by more than 20%. Therefore, if the benchmark average return is 10% the investment must return 12% or more, to stay in the 'Keep' Zone and be identified with Dark Green shading.

K

Hypothetical Benchmark  
Average Return = 10%

A return of less than 12%, but still greater than the average of its benchmark (10% in this example), would place the investment in the 'Above Average Watch' Zone and be identified with Light Green shading.

W

A return of less than 10% (the average of its benchmark), but still greater than 8.5%, would place the investment in the 'Below Average Watch' Zone and be identified with Amber shading.

W

Less than 8.5% return



Replace  
Dial Setting

-15%

The investment is placed in the 'Replacement' Zone when its return trails the average of its respective benchmark by more than -15%. Therefore, if the peer group's average return is 10%, the investment must return 8.5% or more to stay out of the 'Replacement' Zone and be identified with Red shading.

R