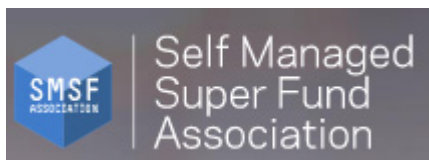


Risk managed equity fund recent articles Stable and rising returns with regular income for retirement planning

Risk managed equity fund (“protected equity”) and addresses sequencing risk – the impact of investment losses – in retirement. We buy and hold ASX20 blue chip high yielding shares and insure downside at the stock specific level with lowest cost alternatives on the ASX. We have a six year track record of **delivering stable and rising investment returns with regular income**. Our innovative risk management approach has at all times a risk-return profile to participate in share price upside with minimal capital at risk (“hockey stick” payoff). Our strategy **benefits** from increasing stock market **volatility**.



SMSF Association innovative retirement income products:

<http://trustees.smsfassociation.com/wp-content/uploads/2016/07/Innovative-retirement-income-products.pdf>



FS Super: The Journal of Superannuation Management:

<http://www.fssuper.com.au/comments/88279872>



Fairfax media: Retirement Planning

<http://www.theage.com.au/money/investing/end-of-sevenyear-rule-brings-a-new-ball-game-for-retirees-20150716-gidojh.html>

Gyrations: Insights into risk management of an equity portfolio for retirement planning

<http://www.gyrostat.com.au/news/gyrations-february-2017-insights-into-risk-management-of-an-equity-portfolio-for-retirement-planning/>

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RISK MANAGED EQUITY FUNDS

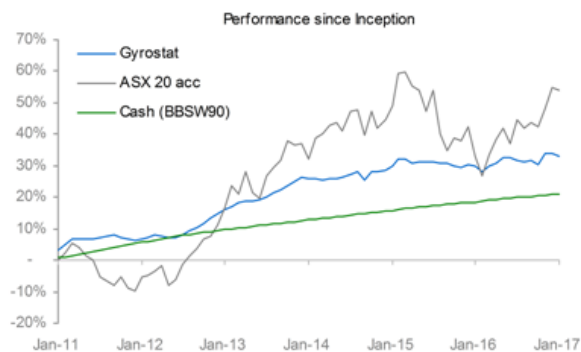
Stable and rising returns with regular income

We are a risk managed equity fund (“protected equity”) and address sequencing risk in retirement

Investment objectives:

- **Returns:** 60-70% ASX20 accumulation index market upside over a rolling 3 year period
- **Distribution:** Minimum cash rate (BBW90) + 3% paid semi annually (currently 4.7% pa)
- **Protection:** No quarterly downside exceeding 2%

Since our inception we have captured 64% of the ASX20 accumulation index upside with no quarterly downside ever exceeding 2%



Gyrostat compounded returns are net of fees and include franking credits, cash (BBSW90) includes re-investment of interest.

ASX 20 accumulation index is benchmarked as the fund holds ASX 20 stocks. Stable and rising investment returns are achieved with protection on falls, and participation in gains.