

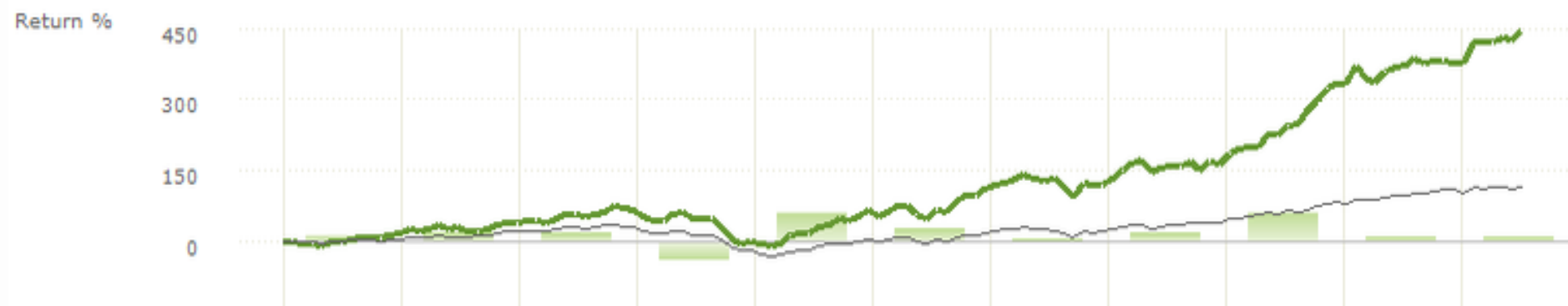
IIM Research: BEV Portfolio Performance

Total Portfolio Returns (July 9/2015)

- YTD (9 months) = 17.4% compared to 9.16% (S&P500)
- 5 years = 244.46% compared to 87.45% (S&P500)
- 10 years = 501.09% compared to 185.51% (S&P500)

Annualized Portfolio Returns

- YTD (9 months) = 13.2% compared to 3.25% (S&P500)
- 5 years = 26.88% compared to 16.2% (S&P500)
- 10 years = 17.76% compared to 7.72% (S&P500)

Compare to: Trailing 12 Months Include Cash[Learn more](#)

Annual Return History	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	YTD
<input checked="" type="checkbox"/> Total Return	14.74	20.97	19.11	-39.12	62.86	27.57	5.72	19.57	64.02	10.47	13.12
<input checked="" type="checkbox"/> Personal Return	14.74	20.97	19.11	-39.12	62.86	27.57	5.72	19.57	64.02	10.47	13.12
— Index Return	4.91	15.79	5.49	-36.92	26.46	15.06	2.11	15.96	32.39	13.69	3.25

[▶ Show Holding Details](#)

Trailing Total Returns

Return	Intraday	1-Week	1-Month	3-Month	YTD	1-Year	3-Year (Ann.)	5-Year (Ann.)	10-Year (Ann.)	Since Purchase (Ann.)	Enter Custom Time
Total	-2.17	-2.93	1.24	0.83	13.12	12.26	28.74	26.88	17.76	18.60	—
Personal	-2.17	-2.93	1.24	0.83	13.12	12.26	28.74	26.88	17.76	18.60	—
Index	—	-1.13	-0.17	-0.22	3.25	7.92	18.75	16.20	7.72	8.40	—

[▶ Show Holding Details](#)

*Total Return and Personal Return will reflect partial returns for any investments not held for the full duration of a specified time period.