

Historical performance

Use this view to model a hypothetical investment, select a reporting period, and compare AFM results with the S&P 500 benchmark.

1 Enter the \$ amount you would have invested.
Min. \$1M

2 Choose a time frame starting no earlier than 2021.

4 Performance Results

3 Results can be viewed in either absolute or relative terms.

5 Compare AFM performance to other large-cap US funds.



Red arrows identify fields that can be adjusted by the user.
Blue arrows identify the resulting output.

Historical performance is provided for illustrative purposes and does not predict future results.

1 **Enter the investment amount**
Enter the hypothetical capital amount. The minimum amount accepted by the platform is USD 1 million.

2 **Select the reporting period**
Choose a start date no earlier than 2021, then confirm the end date for the analysis.

3 **Choose a performance view**
Display the results as absolute performance or activate Comparison to include the benchmark.

4 **Review the summary results**
The table reports portfolio value, portfolio change, AFM contribution and the number of trading days.

5 **Interpret the chart**
The chart compares the selected AFM account with the S&P 500 over the chosen period.