

**BRITISH CAYMANIAN INSURANCE AGENCIES - INVESTMENT PERFORMANCE**  
**AS AT MARCH 31, 2025**



Asset Class	Fund Manager	As of:	QTD	YTD	1 Yr	3 Yr	5 Yr
<i>Annualized Returns in USD</i>							
<b>SELF DIRECTED FUND OPTIONS</b>							
<b>GLOBAL EQUITIES - ACTIVE</b> Bmk: MSCI ACWI NR USD	<b>WCM Quality Growth Global Fund*</b>	<b>31-Mar</b>	<b>-2.90%</b> -1.32%	<b>-2.90%</b> -1.32%	<b>11.30%</b> 7.20%	<b>8.90%</b> 6.90%	<b>14.60%</b> 15.20%
<b>GLOBAL EQUITIES - INDEX/PASSIVE</b> Bmk: MSCI ACWI NR USD	<b>J.P. Morgan Passively Managed Global Equities Strategy</b>	<b>31-Mar</b>	<b>-2.34%</b> -1.79%	<b>-2.34%</b> -1.79%	<b>16.22%</b> 7.15%	<b>11.11%</b> 6.91%	<b>14.87%</b> 15.17%
<b>US EQUITIES - ACTIVE</b> Bmk: S&P 500 Index TR	<b>Harris Oakmark Large Cap Fund*</b>	<b>31-Mar</b>	<b>1.16%</b> -4.27%	<b>1.16%</b> -4.27%	<b>6.40%</b> 8.30%	<b>11.10%</b> 9.10%	<b>23.90%</b> 18.60%
<b>US EQUITIES - INDEX/PASSIVE</b> Bmk: Solactive United States 3000 Index	<b>J.P. Morgan Passively Managed US Equities Strategy</b>	<b>31-Mar</b>	<b>-2.85%</b> -4.90%	<b>-2.85%</b> -4.90%	<b>16.42%</b> 7.02%	<b>11.28%</b> 8.07%	<b>16.50%</b> 18.16%
<b>US SMALL CAP EQUITIES</b> Bmk: Russell/Solactive US 2000 Index	<b>Kayne Anderson Small-Mid Cap Core Fund*</b>	<b>31-Mar</b>	<b>-3.80%</b> -7.38%	<b>-3.80%</b> -7.38%	<b>-3.70%</b> -2.40%	<b>2.40%</b> 2.20%	<b>12.10%</b> 15.20%
<b>EUROPEAN EQUITIES</b> Bmk: MSCI Europe Index	<b>J.P. Morgan Actively Managed European Equities Strategy</b>	<b>31-Mar</b>	<b>7.37%</b> 10.48%	<b>7.37%</b> 10.48%	<b>13.69%</b> 4.10%	<b>13.04%</b> 5.55%	<b>14.52%</b> 10.74%
<b>ASIAN EQUITIES</b> Bmk: MSCI All Country Asia Pacific Index NR (MSACAP)	<b>J.P. Morgan Asia Equities Strategy</b>	<b>31-Mar</b>	<b>2.59%</b> 0.87%	<b>2.59%</b> 0.87%	<b>11.58%</b> 2.91%	<b>3.46%</b> 0.30%	<b>6.72%</b> 5.87%
<b>BALANCED</b> Bmk: N/A	<b>J.P. Morgan Balanced Multi-Asset Portfolio</b>	<b>31-Mar</b>	<b>-0.58%</b> 0.00%	<b>-0.58%</b> 0.00%	<b>11.99%</b> N/A	<b>6.92%</b> N/A	<b>8.88%</b> N/A
<b>GLOBAL BONDS</b> Bmk: Bloomberg Global Aggregate Bond Index TR (BCGATR)	<b>J.P. Morgan Global Bond Strategy</b>	<b>31-Mar</b>	<b>2.03%</b> 2.64%	<b>2.03%</b> 2.64%	<b>5.80%</b> 4.59%	<b>0.55%</b> 1.55%	<b>-0.07%</b> 0.42%
<b>US BONDS</b> Bmk: Bloomberg US Govt/Credit 1-3 yr Bond Index TR	<b>Dolan McEniry Core Plus Fund</b>	<b>31-Mar</b>	<b>1.97%</b> 1.62%	<b>1.97%</b> 1.62%	<b>5.79%</b> 4.88%	<b>3.69%</b> 0.52%	<b>3.76%</b> -0.40%
<b>SHORT TERM / CASH OPTION</b>	<b>J.P. Morgan Liquidity Management Strategy</b>	<b>31-Mar</b>	<b>0.96%</b>	<b>0.96%</b>	<b>4.86%</b>	<b>4.18%</b>	<b>2.50%</b>
<b>MANAGED PORTFOLIOS</b>							
<b>Aggressive Risk Portfolio</b>		<b>31-Mar</b>	<b>-1.62%</b>	<b>-1.62%</b>	<b>14.15%</b>	<b>8.95%</b>	<b>11.99%</b>
<b>Moderate Risk Portfolio</b>		<b>31-Mar</b>	<b>-0.59%</b>	<b>-0.59%</b>	<b>11.58%</b>	<b>6.67%</b>	<b>8.57%</b>
<b>Conservative Risk Portfolio</b>		<b>31-Mar</b>	<b>1.08%</b>	<b>1.08%</b>	<b>7.68%</b>	<b>2.67%</b>	<b>2.95%</b>

**Note:** Prepared by British Caymanian Insurance Agencies Limited which acts solely as an agent on behalf of Coralisle Pension Services Ltd. and does not act as a broker on behalf of its customers. Coralisle Pension Services Ltd. is licenced to conduct Investment Business by the Bermuda Monetary Authority and holds a restricted trust licence with the Cayman Islands Monetary Authority. Please see our General Information and Disclosures page on [www.cgcoralisle.com](http://www.cgcoralisle.com) for more information. Performance Results are reported net of Coralisle Pension Services investment charges. Underlying managers are subject to change at the absolute discretion of the CPS Investment Policy Committee. Historical performance estimates reflect funds currently employed.

\* - The Fund's 3-year and 5-year returns assume the maximum fee charged by the underlying manager.