

Calendar Year Returns

Fund Name	YTD	1-Year	3-Year Annualised
Barclays Wealth Global Mkts 4 B Acc GBP	4.25%	17.58%	8.09%
Discovery Balanced B GBP Acc	2.74%	13.92%	3.28%
DMS Stirling House Growth Acc	1.36%	12.34%	7.50%
Embark Horizon Multi-Asset III Z Acc	1.67%	11.34%	6.07%
IFSL Avellemy 6 A GBP Acc	4.52%	17.20%	
LF Canlife Managed 40% - 85% A Acc	4.63%	15.02%	4.07%
SVS Brown Shipley Balanced A Inc	3.21%	17.48%	6.68%
VT AJ Bell Moderately Adv I Acc	4.04%	16.12%	6.67%
VT Momentum Diversified Growth B Acc	9.21%	30.41%	8.71%
WS Kleinwort Hambros Multi AstBal A Inc	0.98%	9.92%	4.20%

Risk Profile

Fund Name	Liquidity Risk	Credit Risk	Market Risk	Interest Rate Risk	RI Score
Barclays Wealth Global Mkts 4 B Acc GBP					★★★★☆
Discovery Balanced B GBP Acc					★★★★☆
DMS Stirling House Growth Acc					★★★★☆
Embark Horizon Multi-Asset III Z Acc					★★★★☆
IFSL Avellemy 6 A GBP Acc					★★★★☆
LF Canlife Managed 40% - 85% A Acc					★★★★
SVS Brown Shipley Balanced A Inc					★★★★☆
VT AJ Bell Moderately Adv I Acc					★★★★
VT Momentum Diversified Growth B Acc					★★★★☆
WS Kleinwort Hambros Multi AstBal A Inc					★★★★☆