

Calendar Year Returns

Fund Name	YTD	1-Year	3-Year Annualised
Embark Horizon Multi-Asset II Z Acc	1.67%	7.48%	5.61%
LF Canlife Portfolio IV C Acc	3.34%	9.06%	4.64%
Schroder Blended Portfolio 5 F Acc	4.70%	14.59%	
SVS Brown Shipley Income A Inc	4.46%	13.90%	6.27%
VT Greystone Cautious Managed R Acc	3.46%	16.70%	3.58%
VT Momentum Diversified Income B Inc	9.66%	27.18%	7.66%
VT SmartFund Balanced Strategy FGBP Inc	4.28%	13.98%	5.94%
VT Tatton Blended Balanced A Acc	6.34%	16.27%	6.13%
WS Sequel Cau Trgt Ret Strat B£Acc	7.57%	22.33%	4.90%
WS Verbatim Multi-Index Portfolio 4 A	5.28%	13.06%	6.29%

Risk Profile

Fund Name	Liquidity Risk	Credit Risk	Market Risk	Interest Rate Risk	RI Score
Embark Horizon Multi-Asset II Z Acc					★★★★
LF Canlife Portfolio IV C Acc					★★★★
Schroder Blended Portfolio 5 F Acc					★★★★★
SVS Brown Shipley Income A Inc					★★★★
VT Greystone Cautious Managed R Acc					★★★★
VT Momentum Diversified Income B Inc					★★★
VT SmartFund Balanced Strategy FGBP Inc					★★★★★
VT Tatton Blended Balanced A Acc					★★★★
WS Sequel Cau Trgt Ret Strat B£Acc					★★★★
WS Verbatim Multi-Index Portfolio 4 A					★★★★