

# Balanced Income Core Strategy

Whilst the strategy constantly evolves in line with market dynamics, the parameters are featured below:

## Investment objective

To balance long term capital growth and current income whilst maintaining a moderate risk exposure through a diversified portfolio of 'collective' investments which may invest in UK and international equities, corporate and sovereign bonds and cash.

## Risk profile

The capital value will fluctuate in the medium term and capital values may be negative over short time horizons. Risk profile – Medium.

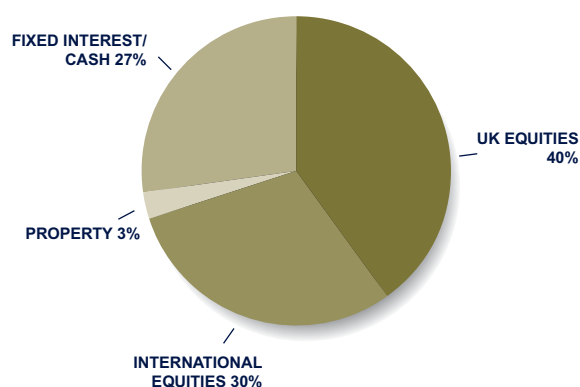
## Minimum investment period

The strategy is not appropriate for investors with a time horizon of less than 5 years.

## Liquidity

Typically, liquidity will not exceed 50%.

## Typical strategy asset allocation



## Top 3 Holdings

JPMF £ Liquidity

Black Rock Absolute Alpha

Gartmore UK Equity Income

## KEY FACTS

Yield objective	3%
Minimum investment Lump sum	£100,000
Charges	
Initial	1%
Annual	1%
Wrappers	
PEP/ISA	✓
SIPP	✓
Offshore Bond	✓
Onshore Bond	✓

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