

Balanced Growth Core Strategy

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

Investment objective

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

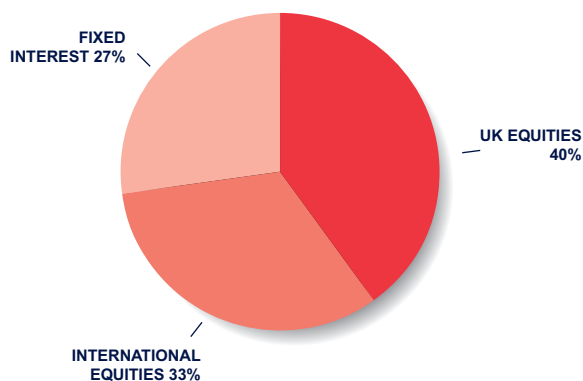
Minimum investment period

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

Argonaut European Income

Thames River Global Bond

KEY FACTS

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

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