

Site Manual

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001 AllotMint - Watch your money grow
http://localhost:5173/movers

URL: http://localhost:5173/movers

![en](/flags/en.svg)![fr](/flags/fr.svg)![de](/flags/de.svg)![es](/flags/es.svg)![pt](/flags/pt.svg)

Alerts

Threshold %: Save

* : BUY 3IN.L: RSI 27.87 <= 30
* : BUY FSFL.L: RSI 29.36 <= 30
* : BUY GBPG.L: RSI 20.61 <= 30
* : BUY IBZL.L: Price gained 5.96% in last 7d
* : BUY IONQ.N: Price gained 7.44% in last 7d
* : BUY NESF.L: RSI 21.43 <= 30
* : BUY POLR.L: RSI 22.81 <= 30
* : BUY SPGP.L: Price gained 5.38% in last 7d
* : BUY THX.L: Price gained 20.40% in last 7d
* : alex portfolio drawdown -99.40% exceeds 20.00%
* : joe portfolio drawdown -99.48% exceeds 20.00%
* : lucy portfolio drawdown -99.58% exceeds 20.00%
* : steve portfolio drawdown -99.41% exceeds 20.00%

[Movers](/movers)[Group](/movers)[Instrument](/instrument)[Member](/member)[Timeseries](/timeseries)[Data Admin](/dataadmin)[Reports](/reports)[User Settings](/settings)[Support](/support)[Scenario Tester](/scenario)

Refresh Prices

Watchlist:FTSE 100FTSE 250FTSE 350FTSE All-SharePortfolioPeriod:1d1w1m3m1yExclude positions <0.5%

| Ticker | Name | % | Δ £ | % of portfolio |
|--------|------|-----|-----|----------------|
| --- | --- | --- | --- | --- |

| Ticker | Action | Reason |
|-------------|--------|--------------------------------|
| --- | --- | --- |
| [3IN.L](#) | BUY | RSI 27.87 <= 30 |
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002 AllotMint - Watch your money grow
http://localhost:5173/instrument/all

URL: http://localhost:5173/instrument/all

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[Movers](/movers)[Group](/?group=all)[Instrument](/instrument/all)[Member](/member)[Timeseries](/timeseries)[Data Admin](/dataadmin)[Reports](/reports)[User Settings](/settings)[Support](/support)[Scenario Tester](/scenario)

Refresh Prices

Group:All owners combined Adults Children

Columns:Units Cost Market Gain Gain %

| Ticker ▲ | Name | CCY | Type | Units | Cost £ | Market £ | Gain £ | Gain % | Last £ | Last Date | 7d % | 30d % | |
|----------|-----------------------------------|-----------------|----------------|--------|--------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| 3IN.L | 3i Infrastructure plc | Ord | NPV | GBX | Equity | 2,115 | £7,034.97 | £7,212.15 | £177.18 | 2.5% | £3.41 | 8/29/2025 | |
| ADBE.N | Adobe Inc Comm Stk | US\$.0001 | *R | USD | Equity | 6 | £1,859.31 | £1,585.14 | -£274.17 | -14.7% | £264.19 | 8/29/2025 | |
| ADM.L | Admiral Group | Ord | GBP0.01 | GBX | Equity | 73 | £2,483.06 | £2,646.98 | £163.92 | 6.6% | £36.26 | 8/29/2025 | |
| AIE.L | Ashoka India Equity Inv Trust Plc | Ord | GBP0.01 | GBX | Equity | 704 | £1,998.32 | £1,837.44 | -£160.88 | -8.1% | £2.61 | 8/29/2025 | |
| AIGE.L | WisdomTree Energy | *R | GBP | Equity | 1,322 | £4,009.90 | £4,494.80 | £484.90 | 12.1% | £3.40 | 8/29/2025 | | |
| ARG.TO | Amerigo Resources Corp | COM | NPV | *R | CAD | Equity | 2,492 | £2,499.46 | £3,004.44 | £504.98 | 20.2% | £1.21 | 8/29/2025 |
| AV.L | Aviva Plc | Ordinary Shares | 32 17/19 pence | GBX | Equity | 50 | £263.09 | £325.80 | £62.71 | 23.8% | £6.52 | 8/29/2025 | |
| AZN.L | AstraZeneca plc | Ordinary | US\$.025 | GBX | Equity | 18 | £1,934.03 | £2,122.20 | £188.17 | 9.7% | £117.90 | 8/29/2025 | |

| |
|---|
| B.N Barrick Mining Corp NPV *R USD Equity 66 £998.21 £1,301.75 £303.54 30.4% |
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| BBAI.N BigBear.ai Holdings Inc USD0.0001 *R USD Equity 40 £118.87 £150.20 |
| £31.33 26.4% £3.76 8/29/2025 — — |
| BIIB.N Biogen Inc USD (CDI) *R USD Equity 20 £1,992.42 £1,958.57 -£33.85 -1.7% |
| £97.93 8/29/2025 — — |
| BLND.L British Land Co plc Ordinary 25p GBX Equity 1,218 £4,997.30 £4,085.17 |
| -£912.13 -18.3% £3.35 8/29/2025 — — |
| BME.L B&M European Value Retail SA GBX Equity 528 £2,345.22 £1,270.90 |
| -£1,074.32 -45.8% £2.41 8/29/2025 — — |
| BMY.L Bloomsbury Publishing plc Ordinary 1.25p Shares GBX Equity 181 £994.99 |
| £885.09 -£109.90 -11.0% £4.89 8/29/2025 — — |
| BP.L BP Plc Ordinary US\$0.25 GBX Equity 842 £2,999.54 £3,638.28 £638.74 21.3% |
| £4.32 8/29/2025 — — |
| BPCR.L BioPharma Credit plc ORD USD0.01 *R GBP Equity 45,854 £34,067.44 |
| £41,268.60 £7,201.16 21.1% £0.90 8/29/2025 — — |
| BUT.L Brunner Investment Trust Plc GBX Investment Trust 141 £1,973.66 £2,021.94 |
| £48.28 2.4% £14.34 8/29/2025 — — |
| BYG.L Big Yellow Group Ordinary 10p GBX Equity 301 £2,998.45 £2,739.10 -£259.35 |
| -8.6% £9.10 8/29/2025 — — |
| CARD.L Card Factory plc Ordinary 1p GBX Equity 2,065 £1,999.30 £2,147.60 £148.30 |
| 7.4% £1.04 8/29/2025 — — |
| CASH.GBP Cash (GBP) GBP Cash 158,371.31 £158,371.31 £158,371.31 £0.00 0.0% |
| £1.00 8/29/2025 — — |
| CLIG.L City of London Investment Group plc Ordinary 1p GBP Equity 14 £4,781.00 |
| £5,432.00 £651.00 13.6% £388.00 8/29/2025 — — |
| CNA.L Centrica plc Ord 6,14/81p GBX Equity 1,880 £2,998.77 £3,025.86 £27.09 |
| 0.9% £1.61 8/29/2025 — — |
| CUKS.L iShares VII plc MSCI UK Small CAP UCITS ETF GBX ETF 42 £10,206.69 |
| £10,411.80 £205.11 2.0% £247.90 8/29/2025 — — |
| ERNS.L iShares IV plc GBP Ultrashort Bond UCITS ETF GBP Dist GBP ETF 824 £80,200.40 |
| £83,710.16 £3,509.76 4.4% £101.59 8/29/2025 — — |
| ESIH.L iShares VI plc MSCI EUR HealthCare Sect UCITS ETF Acc GBP ETF 790 £4,792.64 |
| £4,439.80 -£352.84 -7.4% £5.62 8/29/2025 — — |
| FSFL.L Foresight Solar Fund Ltd Ordinary NPV GBX Fund 18,720 £16,634.91 |
| £15,294.24 -£1,340.67 -8.1% £0.82 8/29/2025 — — |
| GAMA.L Gamma Communications plc Ordinary Shares 0.25p GBX Equity 247 £2,997.43 |
| £2,608.32 -£389.11 -13.0% £10.56 8/29/2025 — — |
| GAW.L Games Workshop Group Ordinary 5p GBX Equity 12 £1,902.66 £1,854.00 |
| -£48.66 -2.6% £154.50 8/29/2025 — — |
| GBPG.L Goldman Sachs ETF ICAV Access UK Gilts 1-10 Years UCITS ETF Class GBP Dis GBP |
| ETF 1,150 £49,638.71 £49,266.00 -£372.71 -0.8% £42.84 8/29/2025 — — |
| GILG.L iShares III Plc Global Inflatin Linked Govt Bonds UCITS ETF GBP D GBP ETF 3,721 |
| £19,997.92 £16,521.24 -£3,476.68 -17.4% £4.44 8/29/2025 — — |
| GRG.L Greggs Plc Ord 2p GBX Equity 10 £183.62 £157.70 -£25.92 -14.1% £15.77 |
| 8/29/2025 — — |
| GSK.L GSK plc ORD GBP0.3125 GBX Equity 263 £4,032.35 £3,820.08 -£212.27 |
| -5.3% £14.53 8/29/2025 — — |
| HFD.L Halfords Group plc GBX Equity 100 £139.92 £137.00 -£2.92 -2.1% £1.37 |
| 8/29/2025 — — |
| HFEL.L Henderson Far East Income Ltd Ordinary NPV GBX Equity 5,008 £11,124.91 |
| £11,568.48 £443.57 4.0% £2.31 8/29/2025 — — |
| HICL.L HICL Infrastructure plc ORD GBP0.0001 GBP Equity 90 £10,641.00 £10,782.00 |

£141.00 | 1.3% | £119.80 | 8/29/2025 | — | — |
| IBZL.L | iShares plc MSCI Brazil UCITS ETF (Dist) | GBX | ETF | 302 | £4,986.27 | £5,318.98 |
£332.71 | 6.7% | £17.61 | 8/29/2025 | — | — |
| IEFV.L | iShares IV plc Edge MSCI Europe Value Factor UCITS ETF Acc | GBX | ETF | 6,821 |
£51,703.92 | £63,107.89 | £11,403.97 | 22.1% | £9.25 | 8/29/2025 | — | — |
| IFX.DE | Infineon Technologies AG Ordinary NPV *R | EUR | Equity | 171 | £4,993.76 |
£5,173.02 | £179.26 | 3.6% | £30.25 | 8/29/2025 | — | — |
| III.L | 3i Group Plc Ordinary 73 19/22p | GBX | Equity | 48 | £1,972.31 | £1,929.12 | -£43.19 |
-2.2% | £40.19 | 8/29/2025 | — | — |
| IONQ.N | IonQ Inc USD0.0001 A *R | USD | Equity | 5 | £107.03 | £158.28 | £51.25 | 47.9% |
£31.66 | 8/29/2025 | — | — |
| ISXF.L | iShares III plc iShares GBP Corporate Bond Ex-Financials UCITS ETF *2 | GBP | ETF | 27 |
£3,707.37 | £2,762.10 | -£945.27 | -25.5% | £102.30 | 8/29/2025 | — | — |
| JEGI.L | JPMorgan European Growth & Income plc ORD GBP0.005 | GBX | Equity | 20,445 |
£21,953.76 | £25,862.93 | £3,909.17 | 17.8% | £1.27 | 8/29/2025 | — | — |
| LAES.N | Sealsq Corp USD0.01 *R | USD | Equity | 374 | £999.78 | £745.14 | -£254.64 | -25.5% |
£1.99 | 8/29/2025 | — | — |
| MINV.L | iShares VI plc Edge MSCI World Minimum Volatility UCITS ETF Acc | GBX | ETF | 148 |
£7,814.35 | £8,018.64 | £204.29 | 2.6% | £54.18 | 8/29/2025 | — | — |
| MNDI.L | Mondi plc ORD EURO0.22 | GBX | Equity | 247 | £2,997.90 | £2,572.51 | -£425.39 |
-14.2% | £10.42 | 8/29/2025 | — | — |
| MONY.L | Mony Group Plc Ord 2p | GBX | Equity | 1,387 | £2,998.45 | £2,771.23 | -£227.22 |
-7.6% | £2.00 | 8/29/2025 | — | — |
| NBIX.N | Neurocrine Biosciences Inc Com Stk NPV (CDI) *R | USD | Equity | 10 | £944.37 |
£1,033.95 | £89.58 | 9.5% | £103.39 | 8/29/2025 | — | — |
| NESF.L | NextEnergy Solar Fund Ltd Ordinary NPV | GBX | Fund | 7,044 | £4,999.57 | £4,712.44 |
-£287.13 | -5.7% | £0.67 | 8/29/2025 | — | — |
| PBR-A.N | Petroleo Brasileiro SA Petrobras Spon ADR Each Repr 2 Pref Shs NPV *R | USD |
Equity | 612 | £4,992.46 | £5,199.10 | £206.64 | 4.1% | £8.50 | 8/29/2025 | — | — |
| PFE.N | Pfizer Inc Com Stk USD0.05 (CDI) *R | USD | Equity | 140 | £2,483.05 | £2,567.39 |
£84.34 | 3.4% | £18.34 | 8/29/2025 | — | — |
| PHGP.L | WisdomTree Physical Gold (GBP) | GBX | Equity | 21 | £4,798.67 | £4,985.40 | £186.73 |
3.9% | £237.40 | 8/29/2025 | — | — |
| PHSP.L | WisdomTree Physical Silver (GBP) | GBX | Equity | 80 | £1,985.07 | £2,131.60 |
£146.53 | 7.4% | £26.65 | 8/29/2025 | — | — |
| POLR.L | Polar Capital Holdings Plc Ord 2.5p | GBX | Equity | 100 | £380.86 | £459.00 | £78.14 |
20.5% | £4.59 | 8/29/2025 | — | — |
| QBTS.N | D-Wave Quantum Inc USD0.0001 A *R | USD | Equity | 79 | £999.66 | £913.95 |
-£85.71 | -8.6% | £11.57 | 8/29/2025 | — | — |
| REC.L | Record Plc | GBX | Equity | 5,467 | £3,496.15 | £3,334.87 | -£161.28 | -4.6% | £0.61 |
8/29/2025 | — | — |
| SBRY.L | Sainsbury (J) plc Ordinary 28,4/7p | GBX | Equity | 645 | £1,604.05 | £1,931.13 |
£327.08 | 20.4% | £2.99 | 8/29/2025 | — | — |
| SEGA.L | iShares III plc Core Euro Government Bond UCITS ETF Dist *1 | GBP | ETF | 414 |
£39,980.30 | £39,330.00 | -£650.30 | -1.6% | £95.00 | 8/29/2025 | — | — |
| SERE.L | Schroder European Real Estate Investment Trust plc Ordinary 10p | GBX | Real Estate |
30,769 | £20,193.29 | £20,061.39 | -£131.90 | -0.7% | £0.65 | 8/29/2025 | — | — |
| SFR.L | Severfield plc Ordinary 2.5p | GBX | Equity | 5,679 | £1,999.90 | £1,845.67 | -£154.23 |
-7.7% | £0.33 | 8/29/2025 | — | — |
| SN.L | Smith & Nephew plc Ordinary USD0.20 | GBX | Equity | 132 | £1,494.19 | £1,825.56 |
£331.37 | 22.2% | £13.83 | 8/29/2025 | — | — |
| SNWS.L | Smiths News plc Ordinary 5p | GBX | Equity | 4,885 | £2,999.71 | £2,833.30 |
-£166.41 | -5.5% | £0.58 | 8/29/2025 | — | — |

| SPGP.L | iShares V plc Gold Producers UCITS ETF Acc (GBP) | GBX | ETF | 434 | £6,277.32 | £9,259.39 | £2,982.07 | 47.5% | £21.34 | 8/29/2025 | — | — |

| TFIF.L | TwentyFour Income Fund Ltd Ordinary GBP 0.01 | GBX | Fund | 4,571 | £4,999.77 | £5,128.66 | £128.89 | 2.6% | £1.12 | 8/29/2025 | — | — |

| THX.L | Thor Explorations Ltd NPV (DI) | GBX | Equity | 10,252 | £2,896.50 | £6,110.19 | £3,213.69 | 111.0% | £0.60 | 8/29/2025 | — | — |

| UKW.L | Greencoat UK Wind plc Ordinary 1p | GBX | Equity | 15,117 | £20,051.75 | £16,492.65 | -£3,559.10 | -17.7% | £1.09 | 8/29/2025 | — | — |

| ULVR.L | The Unilever Group | GBX | Equity | 40 | £1,964.31 | £1,860.80 | -£103.51 | -5.3% | £46.52 | 8/29/2025 | — | — |

| UNH.N | UnitedHealth Group Inc Com Stk USD0.01 *R | USD | Equity | 4 | £884.46 | £918.02 | £33.56 | 3.8% | £229.51 | 8/29/2025 | — | — |

| UPS.N | United Parcel Service Class 'B' Com Stock US\$0.01 (CDI) *R | USD | Equity | 13 | £944.62 | £841.91 | -£102.71 | -10.9% | £64.76 | 8/29/2025 | — | — |

| UTHR.N | United Therapeutics Corp Com Stk USD0.01 *R | USD | Equity | 8 | £1,909.80 | £1,805.76 | -£104.04 | -5.4% | £225.72 | 8/29/2025 | — | — |

| VHYLL | Vanguard Funds Plc FTSE All World High Dividend Yield UCITS ETF | GBP | ETF | 423 | £19,971.35 | £24,199.83 | £4,228.48 | 21.2% | £57.21 | 8/29/2025 | — | — |

| VOD.L | Vodafone Group plc USD0.20 20/21 | GBX | Equity | 290 | £200.46 | £256.24 | £55.78 | 27.8% | £0.88 | 8/29/2025 | — | — |

| VWRL.L | Vanguard FTSE All-World UCITS ETF (GBP) | GBP | ETF | 36 | £3,669.48 | £4,148.64 | £479.16 | 13.1% | £115.24 | 8/29/2025 | — | — |

| WCOS.L | SPDR MSCI World Consumer Staples UCITS ETF *1 *R | GBP | ETF | 130 | £4,964.37 | £6,654.70 | £1,690.33 | 34.0% | £51.19 | 8/29/2025 | — | — |

| WIX.L | Wickes Group Plc ORD GBP0.1 | GBX | Equity | 100 | £191.96 | £199.60 | £7.64 | 4.0% | £2.00 | 8/29/2025 | — | — |

003 AllotMint - Watch your money grow
http://localhost:5173/member/alex

URL: http://localhost:5173/member/alex

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Refresh Prices

Owner:alexjoelucysteve

Portfolio: alex

=====

As of 8/31/2025

Approx Total: £66,691.27

Value at Risk

Period:1W1M3M1Y

No VaR data available.

ISA (GBP)

Est Value: £54,737.71

Last updated: 8/6/2025

Range:7d30d180d

View:AllETFsEquityBond

Quick Filters:Sell-eligible

Columns:UnitsCost £Mkt £Gain £Gain %

| | | | | | | | | | | All | Yes | No | | |
|--|-----------|---------------|---|-------|------------|-----------|--------|-----------|--------|-----------|---------------|---------------|-----------|--|
| | | | | | | | | | | | | | | |
| | -- | | -- | | -- | | -- | | -- | | -- | | | |
| | Ticker | ▲ | Name | Trend | CCY | Type | Units | Px £ | Cost £ | Mkt £ | Gain £ | Gain % | Weight % | |
| | Acquired | | Days Held | | Eligible? | | | | | | | | | |
| | CASH.GBP | | Cash (GBP) | | GBP | Cash | | 11,861.77 | | £1.00 | | £11,861.77 | | |
| | 0.0% | | 21.7% | | — | | — | | ✓ | Eligible | | | | |
| | CUKS.L | | iShares VII plc MSCI UK Small CAP UCITS ETF | | GBX | ETF | | 8 | | £247.90 | Source: Stooq | | | |
| | £1,897.20 | | £1,983.20 | | £86.00 | 4.5% | | 3.6% | | 8/31/2024 | | 365 | | |
| | X | 0 | | | | | | | | | | | | |
| | ERNS.L | | iShares IV plc GBP Ultrashort Bond UCITS ETF GBP Dist | | GBP | ETF | | 225 | | | | | | |
| | £101.59 | Source: Stooq | £21,741.75 | | £22,857.75 | £1,116.00 | | 5.1% | | 41.8% | | 8/31/2024 | | |
| | X | 0 | | | | | | | | | | | | |
| | HFEL.L | | Henderson Far East Income Ltd Ordinary NPV | | GBX | Equity | | 902 | | £2.31 | Source: Stooq | | | |
| | £2,045.83 | | £2,083.62 | | £37.79 | 1.8% | | 3.8% | | 8/31/2024 | | 365 | | |
| | X | 0 | | | | | | | | | | | | |
| | IEFV.L | | iShares IV plc Edge MSCI Europe Value Factor UCITS ETF Acc | | GBX | ETF | | 636 | | £9.25 | Source: Yahoo | £4,715.94 | | |
| | £5,884.27 | | £1,168.33 | | 24.8% | 10.7% | | 8/31/2024 | | 365 | | X | 0 | |
| | | | | | | | | | | | | | | |
| | JEGI.L | | JPMorgan European Growth & Income plc ORD GBP0.005 | | GBX | Equity | | 4,101 | | £1.27 | Source: Stooq | £4,242.48 | | |
| | £5,187.77 | | £945.29 | | 22.3% | 9.5% | | 8/31/2024 | | 365 | | X | 0 | |
| | | | | | | | | | | | | | | |
| | MINV.L | | iShares VI plc Edge MSCI World Minimum Volatility UCITS ETF Acc | | GBX | ETF | | 37 | | £54.18 | Source: Yahoo | £1,926.59 | | |
| | £2,004.66 | | £78.07 | | 4.1% | 3.7% | | 8/31/2024 | | 365 | | X | 0 | |
| | | | | | | | | | | | | | | |
| | SERE.L | | Schroder European Real Estate Investment Trust plc Ordinary 10p | | GBX | Real | Estate | | 4,409 | | £0.65 | Source: Stooq | £2,828.37 | |
| | £2,874.67 | | £46.30 | | 1.6% | 5.3% | | 8/31/2024 | | 365 | | X | 0 | |
| | | | | | | | | | | | | | | |

SIPP (GBP)

Est Value: £11,953.56

Last updated: 8/6/2025

Range:7d30d180d

View:AllETFsEquityBond

Quick Filters:Sell-eligible

Columns:UnitsCost £Mkt £Gain £Gain %

| | | | | | | | | | | All | Yes | No | |
|--|----------|---|------------|-------|-----------|------|-------|----------|--------|----------|--------|-----------|----------|
| | | | | | | | | | | | | | |
| | -- | | -- | | -- | | -- | | -- | | -- | | |
| | Ticker | ▲ | Name | Trend | CCY | Type | Units | Px £ | Cost £ | Mkt £ | Gain £ | Gain % | Weight % |
| | Acquired | | Days Held | | Eligible? | | | | | | | | |
| | CASH.GBP | | Cash (GBP) | | GBP | Cash | | 2,729.52 | | £1.00 | | £2,729.52 | |
| | 0.0% | | 22.8% | | — | | — | | ✓ | Eligible | | | |

| ERNS.L | iShares IV plc GBP Ultrashort Bond UCITS ETF GBP Dist | | GBP | ETF | 38 | £101.59Source: Stooq | £3,671.94 | £3,860.42 | £188.48 | 5.1% | 32.3% | 8/31/2024 | 365 | X 0 |

| IEFV.L | iShares IV plc Edge MSCI Europe Value Factor UCITS ETF Acc | | GBX | ETF | 231 | £9.25Source: Yahoo | £1,712.87 | £2,137.21 | £424.34 | 24.8% | 17.9% | 8/31/2024 | 365 | X 0 |

| SPGP.L | iShares V plc Gold Producers UCITS ETF Acc (GBP) | | GBX | ETF | 54 | £21.34Source: Stooq | £711.59 | £1,152.09 | £440.50 | 61.9% | 9.6% | 8/31/2024 | 365 | X 0 |

| VWRL.L | Vanguard FTSE All-World UCITS ETF (GBP) | | GBP | ETF | 18 | £115.24Source: Stooq | £1,834.74 | £2,074.32 | £239.58 | 13.1% | 17.4% | 8/31/2024 | 365 | X 0 |

004 AllotMint - Watch your money grow
http://localhost:5173/timeseries

URL: http://localhost:5173/timeseries

![en](/flags/en.svg)![fr](/flags/fr.svg)![de](/flags/de.svg)![es](/flags/es.svg)![pt](/flags/pt.svg)

Alerts

Threshold %: Save

* : BUY 3IN.L: RSI 27.87 <= 30
* : BUY FSFL.L: RSI 29.36 <= 30
* : BUY GBPG.L: RSI 20.61 <= 30
* : BUY IBZL.L: Price gained 5.96% in last 7d
* : BUY IONQ.N: Price gained 7.44% in last 7d
* : BUY NESF.L: RSI 21.43 <= 30
* : BUY POLR.L: RSI 22.81 <= 30
* : BUY SPGP.L: Price gained 5.38% in last 7d
* : BUY THX.L: Price gained 20.40% in last 7d
* : alex portfolio drawdown -99.40% exceeds 20.00%
* : joe portfolio drawdown -99.48% exceeds 20.00%
* : lucy portfolio drawdown -99.58% exceeds 20.00%
* : steve portfolio drawdown -99.41% exceeds 20.00%

[Movers](/movers)[Group](/movers)[Instrument](/instrument)[Member](/member)[Timeseries](/timeseries)[Data Admin](/dataadmin)[Reports](/reports)[User Settings](/settings)[Support](/support)[Scenario Tester](/scenario)

Refresh Prices

Timeseries Editor

Ticker Exchange Load

| Date | Open | High | Low | Close | Volume | Ticker | Source | |
|------|------|------|-----|-------|--------|--------|--------|--|
| --- | --- | --- | --- | --- | --- | --- | --- | |

Add Row

Save

005 AllotMint - Watch your money grow
http://localhost:5173/dataadmin

URL: http://localhost:5173/dataadmin

![en](/flags/en.svg)![fr](/flags/fr.svg)![de](/flags/de.svg)![es](/flags/es.svg)![pt](/flags/pt.svg)

Alerts

Threshold %: Save

* : BUY 3IN.L: RSI 27.87 <= 30
* : BUY FSFL.L: RSI 29.36 <= 30
* : BUY GBPG.L: RSI 20.61 <= 30
* : BUY IBZL.L: Price gained 5.96% in last 7d
* : BUY IONQ.N: Price gained 7.44% in last 7d
* : BUY NESF.L: RSI 21.43 <= 30
* : BUY POLR.L: RSI 22.81 <= 30
* : BUY SPGP.L: Price gained 5.38% in last 7d
* : BUY THX.L: Price gained 20.40% in last 7d
* : alex portfolio drawdown -99.40% exceeds 20.00%
* : joe portfolio drawdown -99.48% exceeds 20.00%
* : lucy portfolio drawdown -99.58% exceeds 20.00%
* : steve portfolio drawdown -99.41% exceeds 20.00%

[Movers](/movers)[Group](/movers)[Instrument](/instrument)[Member](/member)[Timeseries](/timeseries)[Data Admin](/dataadmin)[Reports](/reports)[User Settings](/settings)[Support](/support)[Scenario Tester](/scenario)

Refresh Prices

Error: HTTP 401 – Unauthorized (<http://localhost:8000/timeseries/admin>)

006 AllotMint - Watch your money grow
<http://localhost:5173/reports>

URL: <http://localhost:5173/reports>

Reports

=====

Owner:alexjoelucysteve

Start: End:

007 AllotMint - Watch your money grow
http://localhost:5173/settings

URL: http://localhost:5173/settings

![en](/flags/en.svg)![fr](/flags/fr.svg)![de](/flags/de.svg)![es](/flags/es.svg)![pt](/flags/pt.svg)

Alerts

Threshold %: Save

* : BUY 3IN.L: RSI 27.87 <= 30
* : BUY FSFL.L: RSI 29.36 <= 30
* : BUY GBPG.L: RSI 20.61 <= 30
* : BUY IBZL.L: Price gained 5.96% in last 7d
* : BUY IONQ.N: Price gained 7.44% in last 7d
* : BUY NESF.L: RSI 21.43 <= 30
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* : alex portfolio drawdown -99.40% exceeds 20.00%
* : joe portfolio drawdown -99.48% exceeds 20.00%
* : lucy portfolio drawdown -99.58% exceeds 20.00%
* : steve portfolio drawdown -99.41% exceeds 20.00%

[Movers](/movers)[Group](/movers)[Instrument](/instrument)[Member](/member)[Timeseries](/timeseries)[Data Admin](/dataadmin)[Reports](/reports)[User Settings](/settings)[Support](/support)[Scenario Tester](/scenario)

Refresh Prices

User Settings

=====

Select owneralexjoelucysteve

008 AllotMint - Watch your money grow
http://localhost:5173/support

URL: http://localhost:5173/support

Support

=====

Online Yes

Environment

```
| | |
| --- | --- |
| BASE\_URL | / |
| DEV | true |
| MODE | development |
| PROD | false |
| SSR | false |
| VITE\_API\_URL | <http://localhost:8000> [swagger](http://localhost:8000/docs#/)
```

Notifications

Enable Push Alerts

Configuration

Tabs Enabled

instrument performance transactions screener trading timeseries watchlist virtual support settings reports

Other Switches

reload skip_snapshot_warm selenium_headless offline_mode disable_auth relative_view enabled

Other parameters

theme dark light system

Save

Telegram Message

Send

009 AllotMint - Watch your money grow
http://localhost:5173/scenario

URL: http://localhost:5173/scenario

![en](/flags/en.svg)![fr](/flags/fr.svg)![de](/flags/de.svg)![es](/flags/es.svg)![pt](/flags/pt.svg)

Alerts

Threshold %: Save

* : BUY 3IN.L: RSI 27.87 <= 30
* : BUY FSFL.L: RSI 29.36 <= 30
* : BUY GBPG.L: RSI 20.61 <= 30
* : BUY IBZL.L: Price gained 5.96% in last 7d
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* : BUY POLR.L: RSI 22.81 <= 30
* : BUY SPGP.L: Price gained 5.38% in last 7d
* : BUY THX.L: Price gained 20.40% in last 7d
* : alex portfolio drawdown -99.40% exceeds 20.00%
* : joe portfolio drawdown -99.48% exceeds 20.00%
* : lucy portfolio drawdown -99.58% exceeds 20.00%
* : steve portfolio drawdown -99.41% exceeds 20.00%

[Movers](/movers)[Group](/movers)[Instrument](/instrument)[Member](/member)[Timeseries](/timeseries)[Data Admin](/dataadmin)[Reports](/reports)[User Settings](/settings)[Support](/support)[Scenario Tester](/scenario)

Refresh Prices

Apply

010 AllotMint - Watch your money grow
http://localhost:5173/?group=all

URL: http://localhost:5173/?group=all

![en](/flags/en.svg)![fr](/flags/fr.svg)![de](/flags/de.svg)![es](/flags/es.svg)![pt](/flags/pt.svg)

Alerts

Threshold %: Save

* : BUY 3IN.L: RSI 27.87 <= 30
* : BUY FSFL.L: RSI 29.36 <= 30
* : BUY GBPG.L: RSI 20.61 <= 30
* : BUY IBZL.L: Price gained 5.96% in last 7d
* : BUY IONQ.N: Price gained 7.44% in last 7d
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* : BUY POLR.L: RSI 22.81 <= 30
* : BUY SPGP.L: Price gained 5.38% in last 7d
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* : joe portfolio drawdown -99.48% exceeds 20.00%
* : lucy portfolio drawdown -99.58% exceeds 20.00%
* : steve portfolio drawdown -99.41% exceeds 20.00%

[Movers](/movers)[Group](/?group=all)[Instrument](/instrument/all)[Member](/member)[Timeseries](/timeseries)[Data Admin](/dataadmin)[Reports](/reports)[User Settings](/settings)[Support](/support)[Scenario Tester](/scenario)

Refresh Prices

Group:All owners combined Adults Children

All owners combined

Alpha vs Benchmark

909,170,602,041,633.80%

Tracking Error

2,187.22%

Max Drawdown

-99.41%

- * Cash
- * ETF
- * Equity
- * Fund
- * Investment Trust
- * Real Estate

Cash 21.07% Fund 3.34% Equity 29.12% ETF 43.53% Real Estate 2.67% Investment Trust 0.27%

SectorRegion

Unknown Financials Miscellaneous Industrials Real Estate Investment Trusts Commodities - Energy-10000010002000030000

Total Value

£751,557.12

Day Change

£0.00 (0.00%)

Total Gain

£28,832.99 (3.99%)

| Owner Total Value Day Change Day Change % Total Gain Total Gain % |
|---|
| --- --- --- --- --- --- |
| steve £548,716.66 £0.00 0.00% £14,093.99 2.64% |
| lucy £79,260.88 £0.00 0.00% £5,569.64 7.56% |
| alex £66,691.27 £0.00 0.00% £4,770.68 7.70% |
| joe £56,888.31 £0.00 0.00% £4,398.68 8.38% |

steve • SIPP — £469,124.98

Range:7d30d180d

View:AllETFEquityBond

Quick Filters:Sell-eligible

Columns:UnitsCost £Mkt £Gain £Gain %

| AllYesNo |
|---|
| --- --- --- --- --- --- --- --- --- --- --- --- --- |
| Ticker ▲ Name Trend CCY Type Units Px £ Cost £ Mkt £ Gain £ Gain % Weight % |
| Acquired Days Held Eligible? |
| 3IN.L 3i Infrastructure plc Ord NPV GBX Equity 1,519 £3.41Source: Stooq £4,994.39 |
| £5,179.79 £185.40 3.7% 1.1% 8/31/2024 365 ✘ 0 |
| ADBE.N Adobe Inc Comm Stk US\$.0001 *R USD Equity 6 £264.19Source: Yahoo |
| £1,859.31 £1,585.14 -£274.17 -14.7% 0.3% 8/31/2024 365 ✘ 0 |
| ADM.L Admiral Group Ord GBP0.01 GBX Equity 73 £36.26Source: Stooq £2,483.06 |
| £2,646.98 £163.92 6.6% 0.6% 8/31/2024 365 ✘ 0 |
| AIE.L Ashoka India Equity Inv Trust Plc Ord GBP0.01 GBX Equity 704 £2.61Source: Stooq £1,998.32 £1,837.44 -£160.88 -8.1% 0.4% 8/31/2024 365 ✘ 0 |
| AIGE.L WisdomTree Energy *R GBP Equity 1,322 £3.40Source: Yahoo £4,009.90 |
| £4,494.80 £484.90 12.1% 1.0% 8/31/2024 365 ✘ 0 |
| ARG.TO Amerigo Resources Corp COM NPV *R CAD Equity 2,492 £1.21Source: Yahoo |
| £2,499.46 £3,004.44 £504.98 20.2% 0.6% 8/31/2024 365 ✘ 0 |

| |
|--|
| AV.L Aviva Plc Ordinary Shares 32 17/19 pence GBX Equity 50 £6.52Source: Stooq £263.09 £325.80 £62.71 23.8% 0.1% 8/31/2024 365 X 0 |
| AZN.L AstraZeneca plc Ordinary US\$0.25 GBX Equity 18 £117.90Source: Stooq £1,934.03 £2,122.20 £188.17 9.7% 0.5% 8/31/2024 365 X 0 |
| B.N Barrick Mining Corp NPV *R USD Equity 66 £19.72Source: Yahoo £998.21 £1,301.75 £303.54 30.4% 0.3% 8/31/2024 365 X 0 |
| BBAI.N BigBear.ai Holdings Inc USD0.0001 *R USD Equity 40 £3.76Source: Yahoo £118.87 £150.20 £31.33 26.4% 0.0% 8/31/2024 365 X 0 |
| BIIB.N Biogen Inc USD (CDI) *R USD Equity 20 £97.93Source: Yahoo £1,992.42 £1,958.57 -£33.85 -1.7% 0.4% 8/31/2024 365 X 0 |
| BLND.L British Land Co plc Ordinary 25p GBX Equity 1,218 £3.35Source: Stooq £4,997.30 £4,085.17 -£912.13 -18.3% 0.9% 8/31/2024 365 X 0 |
| BMY.L Bloomsbury Publishing plc Ordinary 1.25p Shares GBX Equity 181 £4.89Source: Stooq £994.99 £885.09 -£109.90 -11.0% 0.2% 8/31/2024 365 X 0 |
| BP.L BP Plc Ordinary US\$0.25 GBX Equity 842 £4.32Source: Stooq £2,999.54 £3,638.28 £638.74 21.3% 0.8% 8/31/2024 365 X 0 |
| BPCR.L BioPharma Credit plc ORD USD0.01 *R GBP Equity 35,792 £0.90Source: Stooq £25,112.26 £32,212.80 £7,100.54 28.3% 6.9% 8/31/2024 365 X 0 |
| BYG.L Big Yellow Group Ordinary 10p GBX Equity 301 £9.10Source: Stooq £2,998.45 £2,739.10 -£259.35 -8.6% 0.6% 8/31/2024 365 X 0 |
| CARD.L Card Factory plc Ordinary 1p GBX Equity 2,065 £1.04Source: Stooq £1,999.30 £2,147.60 £148.30 7.4% 0.5% 8/31/2024 365 X 0 |
| CASH.GBP Cash (GBP) GBP Cash 102,511.37 £1.00 £102,511.37 £102,511.37 £0.00 0.0% 21.9% — — ✓ Eligible |
| CLIG.L City of London Investment Group plc Ordinary 1p GBP Equity 14 £388.00Source: Stooq £4,781.00 £5,432.00 £651.00 13.6% 1.2% 8/31/2024 365 X 0 |
| CNA.L Centrica plc Ord 6,14/81p GBX Equity 1,880 £1.61Source: Stooq £2,998.77 £3,025.86 £27.09 0.9% 0.6% 8/31/2024 365 X 0 |
| CUKS.L iShares VII plc MSCI UK Small CAP UCITS ETF GBX ETF 19 £247.90Source: Stooq £4,752.24 £4,710.10 -£42.14 -0.9% 1.0% 8/31/2024 365 X 0 |
| ERNS.L iShares IV plc GBP Ultrashort Bond UCITS ETF GBP Dist GBP ETF 97 £101.59Source: Stooq £9,950.39 £9,854.23 -£96.16 -1.0% 2.1% 8/31/2024 365 X 0 |
| ESIH.L iShares VI plc MSCI EUR HealthCare Sect UCITS ETF Acc GBP ETF 439 £5.62Source: Yahoo £2,497.10 £2,467.18 -£29.92 -1.2% 0.5% 8/31/2024 365 X 0 |
| FSFL.L Foresight Solar Fund Ltd Ordinary NPV GBX Fund 14,310 £0.82Source: Stooq £12,511.12 £11,691.27 -£819.85 -6.6% 2.5% 8/31/2024 365 X 0 |
| GAMA.L Gamma Communications plc Ordinary Shares 0.25p GBX Equity 247 £10.56Source: Stooq £2,997.43 £2,608.32 -£389.11 -13.0% 0.6% 8/31/2024 365 X 0 |
| GAW.L Games Workshop Group Ordinary 5p GBX Equity 12 £154.50Source: Stooq £1,902.66 £1,854.00 -£48.66 -2.6% 0.4% 8/31/2024 365 X 0 |
| GBPG.L Goldman Sachs ETF ICAV Access UK Gilts 1-10 Years UCITS ETF Class GBP Dis GBP ETF 690 £42.84Source: Yahoo £29,964.51 £29,559.60 -£404.91 -1.4% 6.3% 8/31/2024 365 X 0 |
| GILG.L iShares III Plc Global Inflatin Linked Govt Bonds UCITS ETF GBP D GBP ETF 3,721 £4.44Source: Yahoo £19,997.92 £16,521.24 -£3,476.68 -17.4% 3.5% 8/31/2024 365 X 0 |
| GRG.L Greggs Plc Ord 2p GBX Equity 10 £15.77Source: Stooq £183.62 £157.70 -£25.92 -14.1% 0.0% 8/31/2024 365 X 0 |
| GSK.L GSK plc ORD GBP0.3125 GBX Equity 263 £14.53Source: Stooq £4,032.35 £3,820.08 -£212.27 -5.3% 0.8% 8/31/2024 365 X 0 |
| HFEL.L Henderson Far East Income Ltd Ordinary NPV GBX Equity 2,307 £2.31Source: Stooq £4,998.76 £5,329.17 £330.41 6.6% 1.1% 8/31/2024 365 X 0 |

| |
|--|
| HICL.L HICL Infrastructure plc ORD GBP0.0001 GBP Equity 90 £119.80Source: Stooq £10,641.00 £10,782.00 £141.00 1.3% 2.3% 8/31/2024 365 X 0 |
| IBZL.L iShares plc MSCI Brazil UCITS ETF (Dist) GBX ETF 302 £17.61Source: Stooq £4,986.27 £5,318.98 £332.71 6.7% 1.1% 8/31/2024 365 X 0 |
| IEFV.L iShares IV plc Edge MSCI Europe Value Factor UCITS ETF Acc GBX ETF 2,545 £9.25Source: Yahoo £19,997.36 £23,546.34 £3,548.98 17.7% 5.0% 8/31/2024 365 X 0 |
| IFX.DE Infineon Technologies AG Ordinary NPV *R EUR Equity 171 £30.25Source: Yahoo £4,993.76 £5,173.02 £179.26 3.6% 1.1% 8/31/2024 365 X 0 |
| III.L 3i Group Plc Ordinary 73 19/22p GBX Equity 48 £40.19Source: Stooq £1,972.31 £1,929.12 -£43.19 -2.2% 0.4% 8/31/2024 365 X 0 |
| IONQ.N IonQ Inc USD0.0001 A *R USD Equity 5 £31.66Source: Yahoo £107.03 £158.28 £51.25 47.9% 0.0% 8/31/2024 365 X 0 |
| ISXF.L iShares III plc iShares GBP Corporate Bond Ex-Financials UCITS ETF *2 GBP ETF 27 £102.30Source: Yahoo £3,707.37 £2,762.10 -£945.27 -25.5% 0.6% 8/31/2024 365 X 0 |
| JEGI.L JPMorgan European Growth & Income plc ORD GBP0.005 GBX Equity 4,056 £1.27Source: Stooq £4,999.35 £5,130.84 £131.49 2.6% 1.1% 8/31/2024 365 X 0 |
| LAES.N Sealsq Corp USD0.01 *R USD Equity 374 £1.99Source: Yahoo £999.78 £745.14 -£254.64 -25.5% 0.2% 8/31/2024 365 X 0 |
| MINV.L iShares VI plc Edge MSCI World Minimum Volatility UCITS ETF Acc GBX ETF 74 £54.18Source: Yahoo £3,961.17 £4,009.32 £48.15 1.2% 0.9% 8/31/2024 365 X 0 |
| MNDI.L Mondi plc ORD EURO0.22 GBX Equity 247 £10.42Source: Stooq £2,997.90 £2,572.51 -£425.39 -14.2% 0.5% 8/31/2024 365 X 0 |
| MONY.L Mony Group Plc Ord 2p GBX Equity 1,387 £2.00Source: Stooq £2,998.45 £2,771.23 -£227.22 -7.6% 0.6% 8/31/2024 365 X 0 |
| NBIX.N Neurocrine Biosciences Inc Com Stk NPV (CDI) *R USD Equity 10 £103.39Source: Yahoo £944.37 £1,033.95 £89.58 9.5% 0.2% 8/31/2024 365 X 0 |
| NESF.L NextEnergy Solar Fund Ltd Ordinary NPV GBX Fund 7,044 £0.67Source: Stooq £4,999.57 £4,712.44 -£287.13 -5.7% 1.0% 8/31/2024 365 X 0 |
| PBR-A.N Petroleo Brasileiro SA Petrobras Spon ADR Each Repr 2 Pref Shs NPV *R USD Equity 612 £8.50Source: Yahoo £4,992.46 £5,199.10 £206.64 4.1% 1.1% 8/31/2024 365 X 0 |
| PFE.N Pfizer Inc Com Stk USD0.05 (CDI) *R USD Equity 140 £18.34Source: Yahoo £2,483.05 £2,567.39 £84.34 3.4% 0.5% 8/31/2024 365 X 0 |
| PHGP.L WisdomTree Physical Gold (GBP) GBX Equity 21 £237.40Source: Yahoo £4,798.67 £4,985.40 £186.73 3.9% 1.1% 8/31/2024 365 X 0 |
| PHSP.L WisdomTree Physical Silver (GBP) GBX Equity 80 £26.65Source: Stooq £1,985.07 £2,131.60 £146.53 7.4% 0.5% 8/31/2024 365 X 0 |
| POLR.L Polar Capital Holdings Plc Ord 2.5p GBX Equity 100 £4.59Source: Stooq £380.86 £459.00 £78.14 20.5% 0.1% 8/31/2024 365 X 0 |
| QBTS.N D-Wave Quantum Inc USD0.0001 A *R USD Equity 79 £11.57Source: Yahoo £999.66 £913.95 -£85.71 -8.6% 0.2% 8/31/2024 365 X 0 |
| SBRY.L Sainsbury (J) plc Ordinary 28.4/7p GBX Equity 645 £2.99Source: Stooq £1,604.05 £1,931.13 £327.08 20.4% 0.4% 8/31/2024 365 X 0 |
| SEGA.L iShares III plc Core Euro Government Bond UCITS ETF Dist *1 GBP ETF 414 £95.00Source: Yahoo £39,980.30 £39,330.00 -£650.30 -1.6% 8.4% 8/31/2024 365 X 0 |
| SERE.L Schroder European Real Estate Investment Trust plc Ordinary 10p GBX Real Estate 10,201 £0.65Source: Stooq £6,998.93 £6,651.05 -£347.88 -5.0% 1.4% 8/31/2024 365 X 0 |
| SFR.L Severfield plc Ordinary 2.5p GBX Equity 5,679 £0.33Source: Stooq £1,999.90 £1,845.67 -£154.23 -7.7% 0.4% 8/31/2024 365 X 0 |

| |
|---|
| SN.L Smith & Nephew plc Ordinary USD0.20 GBX Equity 132 £13.83Source: Stooq |
| £1,494.19 £1,825.56 £331.37 22.2% 0.4% 8/31/2024 365 X 0 |
| SNWS.L Smiths News plc Ordinary 5p GBX Equity 4,885 £0.58Source: Stooq |
| £2,999.71 £2,833.30 -£166.41 -5.5% 0.6% 8/31/2024 365 X 0 |
| SPGP.L iShares V plc Gold Producers UCITS ETF Acc (GBP) GBX ETF 109 £21.34Source: Stooq |
| £1,994.62 £2,325.51 £330.89 16.6% 0.5% 8/31/2024 365 X 0 |
| TFIF.L TwentyFour Income Fund Ltd Ordinary GBP 0.01 GBX Fund 4,571 £1.12Source: Stooq |
| £4,999.77 £5,128.66 £128.89 2.6% 1.1% 8/31/2024 365 X 0 |
| THX.L Thor Explorations Ltd NPV (DI) GBX Equity 5,126 £0.60Source: Stooq |
| £1,999.96 £3,055.10 £1,055.14 52.8% 0.7% 8/31/2024 365 X 0 |
| UKW.L Greencoat UK Wind plc Ordinary 1p GBX Equity 11,516 £1.09Source: Stooq |
| £14,999.19 £12,563.96 -£2,435.23 -16.2% 2.7% 8/31/2024 365 X 0 |
| UNH.N UnitedHealth Group Inc Com Stk USD0.01 *R USD Equity 4 £229.51Source: Yahoo |
| £884.46 £918.02 £33.56 3.8% 0.2% 8/31/2024 365 X 0 |
| UPS.N United Parcel Service Class 'B' Com Stock US\$0.01 (CDI) *R USD |
| Equity 13 £64.76Source: Yahoo £944.62 £841.91 -£102.71 -10.9% 0.2% 8/31/2024 |
| 365 X 0 |
| UTHR.N United Therapeutics Corp Com Stk USD0.01 *R USD Equity 8 £225.72Source: Yahoo |
| £1,909.80 £1,805.76 -£104.04 -5.4% 0.4% 8/31/2024 365 X 0 |
| VHYL.L Vanguard Funds Plc FTSE All World High Dividend Yield UCITS ETF GBP ETF 423 |
| £57.21Source: Stooq £19,971.35 £24,199.83 £4,228.48 21.2% 5.2% 8/31/2024 365 X 0 |
| VOD.L Vodafone Group plc USD0.20 20/21 GBX Equity 290 £0.88Source: Stooq |
| £200.46 £256.24 £55.78 27.8% 0.1% 8/31/2024 365 X 0 |
| WCOS.L SPDR MSCI World Consumer Staples UCITS ETF *1 *R GBP ETF 130 |
| £51.19Source: Yahoo £4,964.37 £6,654.70 £1,690.33 34.0% 1.4% 8/31/2024 365 X 0 |
| WIX.L Wickes Group Plc ORD GBP0.1 GBX Equity 100 £2.00Source: Stooq £191.96 |
| £199.60 £7.64 4.0% 0.0% 8/31/2024 365 X 0 |

steve • ISA — £79,591.68

Range:7d30d180d

View:AllETFEquityBond

Quick Filters:Sell-eligible

Columns:UnitsCost £Mkt £Gain £Gain %

| |
|---|
| AllYesNo |
| --- --- --- --- --- --- --- --- --- --- --- --- --- --- |
| Ticker ▲ Name Trend CCY Type Units Px £ Cost £ Mkt £ Gain £ Gain % Weight % |
| Acquired Days Held Eligible? |
| 3IN.L 3i Infrastructure plc Ord NPV GBX Equity 596 £3.41Source: Stooq £2,040.58 |
| £2,032.36 -£8.22 -0.4% 2.6% 8/31/2024 365 X 0 |
| BME.L B&M European Value Retail SA GBX Equity 528 £2.41Source: Stooq £2,345.22 |
| £1,270.90 -£1,074.32 -45.8% 1.6% 8/31/2024 365 X 0 |
| BPCR.L BioPharma Credit plc ORD USD0.01 *R GBP Equity 7,046 £0.90Source: Stooq |
| £6,270.94 £6,341.40 £70.46 1.1% 8.0% 8/31/2024 365 X 0 |
| BUT.L Brunner Investment Trust Plc GBX Investment Trust 141 £14.34Source: Stooq |
| £1,973.66 £2,021.94 £48.28 2.4% 2.5% 8/31/2024 365 X 0 |
| CASH.GBP Cash (GBP) GBP Cash 17,199.46 £1.00 £17,199.46 £17,199.46 £0.00 |

lucy • ISA — £79,260.88

Range: 7d-30d-180d

View: All ETF Equity Bond

Quick Filters: Sell-eligible

Columns: Units Cost £ Mkt £ Gain £ Gain %

| All | Yes | No | | | | | | | | | |
|--|-----------|-----------|-----|------|-------|------|--------|-------|--------|--------|----------|
| Ticker ▲ | Name | Trend | CCY | Type | Units | Px £ | Cost £ | Mkt £ | Gain £ | Gain % | Weight % |
| Acquired | Days Held | Eligible? | | | | | | | | | |
| BPCR.L BioPharma Credit plc ORD USD0.01 *R GBP Equity 3,016 £0.90Source: Stooq £2,684.24 £2,714.40 £30.16 1.1% 3.4% 8/31/2024 365 X 0 | | | | | | | | | | | |
| CASH.GBP Cash (GBP) GBP Cash 11,661.61 £1.00 £11,661.61 £11,661.61 £0.00 0.0% 14.7% — — ✓ Eligible | | | | | | | | | | | |
| ERNS.L iShares IV plc GBP Ultrashort Bond UCITS ETF GBP Dist GBP ETF 276 £101.59Source: Stooq £26,669.88 £28,038.84 £1,368.96 5.1% 35.4% 8/31/2024 365 X 0 | | | | | | | | | | | |
| GBPG.L Goldman Sachs ETF ICAV Access UK Gilts 1-10 Years UCITS ETF Class GBP Dis GBP ETF 230 £42.84Source: Yahoo £9,837.10 £9,853.20 £16.10 0.2% 12.4% 8/31/2024 365 X 0 | | | | | | | | | | | |

| |
|--|
| HFEL.L Henderson Far East Income Ltd Ordinary NPV GBX Equity 897 £2.31Source: Stooq £2,034.49 £2,072.07 £37.58 1.8% 2.6% 8/31/2024 365 X 0 |
| IEFV.L iShares IV plc Edge MSCI Europe Value Factor UCITS ETF Acc GBX ETF 1,271 £9.25Source: Yahoo £9,424.47 £11,759.29 £2,334.82 24.8% 14.8% 8/31/2024 365 X 0 |
| JEGI.L JPMorgan European Growth & Income plc ORD GBP0.005 GBX Equity 4,091 £1.27Source: Stooq £4,232.14 £5,175.12 £942.98 22.3% 6.5% 8/31/2024 365 X 0 |
| SERE.L Schroder European Real Estate Investment Trust plc Ordinary 10p GBX Real Estate 5,861 £0.65Source: Stooq £3,759.83 £3,821.37 £61.54 1.6% 4.8% 8/31/2024 365 X 0 |
| SPGP.L iShares V plc Gold Producers UCITS ETF Acc (GBP) GBX ETF 108 £21.34Source: Stooq £1,423.17 £2,304.18 £881.01 61.9% 2.9% 8/31/2024 365 X 0 |
| ULVR.L The Unilever Group GBX Equity 40 £46.52Source: Stooq £1,964.31 £1,860.80 -£103.51 -5.3% 2.3% 8/31/2024 365 X 0 |

alex • ISA — £54,737.71

Range: 7d-30d-180d

View: All ETF Equity Bond

Quick Filters: Sell-eligible

Columns:UnitsCost £Mkt £Gain £Gain %

| | All | Yes | No | | | | | | | | |
|--|-----------|-----------|-----|------|-------|------|--------|-------|--------|--------|----------|
| Ticker ▲ | Name | Trend | CCY | Type | Units | Px £ | Cost £ | Mkt £ | Gain £ | Gain % | Weight % |
| Acquired | Days Held | Eligible? | | | | | | | | | |
| CASH.GBP Cash (GBP) GBP Cash 11,861.77 £1.00 £11,861.77 £11,861.77 £0.00 0.0% 21.7% — — ✓ Eligible | | | | | | | | | | | |
| CUKS.L iShares VII plc MSCI UK Small CAP UCITS ETF GBX ETF 8 £247.90Source: Stooq £1,897.20 £1,983.20 £86.00 4.5% 3.6% 8/31/2024 365 ✘ 0 | | | | | | | | | | | |
| ERNS.L iShares IV plc GBP Ultrashort Bond UCITS ETF GBP Dist GBP ETF 225 £101.59Source: Stooq £21,741.75 £22,857.75 £1,116.00 5.1% 41.8% 8/31/2024 365 ✘ 0 | | | | | | | | | | | |
| HFEL.L Henderson Far East Income Ltd Ordinary NPV GBX Equity 902 £2.31Source: Stooq £2,045.83 £2,083.62 £37.79 1.8% 3.8% 8/31/2024 365 ✘ 0 | | | | | | | | | | | |
| IEFV.L iShares IV plc Edge MSCI Europe Value Factor UCITS ETF Acc GBX ETF 636 £9.25Source: Yahoo £4,715.94 £5,884.27 £1,168.33 24.8% 10.7% 8/31/2024 365 ✘ 0 | | | | | | | | | | | |
| JEGI.L JPMorgan European Growth & Income plc ORD GBP0.005 GBX Equity 4,101 £1.27Source: Stooq £4,242.48 £5,187.77 £945.29 22.3% 9.5% 8/31/2024 365 ✘ 0 | | | | | | | | | | | |
| MINV.L iShares VI plc Edge MSCI World Minimum Volatility UCITS ETF Acc GBX ETF 37 £54.18Source: Yahoo £1,926.59 £2,004.66 £78.07 4.1% 3.7% 8/31/2024 365 ✘ 0 | | | | | | | | | | | |
| SERE.L Schroder European Real Estate Investment Trust plc Ordinary 10p GBX Real Estate 4,409 £0.65Source: Stooq £2,828.37 £2,874.67 £46.30 1.6% 5.3% 8/31/2024 365 ✘ 0 | | | | | | | | | | | |

joe • ISA — £44,930.09

Range:7d30d180d

View:AllETFEquityBond

Quick Filters:Sell-eligible

Columns:UnitsCost £Mkt £Gain £Gain %

| All | Yes | No | | | | | | | | | |
|-----------|---|-----------|------|-------------|-----------|---------|---------------|------------|------------|-----------|---------------------------------------|
| Ticker ▲ | Name | Trend | CCY | Type | Units | Px £ | Cost £ | Mkt £ | Gain £ | Gain % | Weight % |
| Acquired | Days Held | Eligible? | | | | | | | | | |
| CASH.GBP | Cash (GBP) | | GBP | Cash | 9,673.4 | £1.00 | £9,673.40 | £9,673.40 | £0.00 | 0.0% | |
| 21.5% | — | — | ✓ | Eligible | | | | | | | |
| CUKS.L | iShares VII plc MSCI UK Small CAP UCITS ETF | | GBX | ETF | 8 | £247.90 | Source: Stooq | | | | |
| £1,897.20 | £1,983.20 | £86.00 | 4.5% | 4.4% | 8/31/2024 | 365 | X 0 | | | | |
| ERNS.L | iShares IV plc GBP Ultrashort Bond UCITS ETF GBP Dist | | GBP | ETF | 150 | £101.59 | Source: Stooq | £14,494.50 | £15,238.50 | £744.00 | 5.1% 33.9% 8/31/2024 365 X 0 |
| HFEL.L | Henderson Far East Income Ltd Ordinary NPV | | GBX | Equity | 902 | £2.31 | Source: Stooq | £2,045.83 | £2,083.62 | £37.79 | 1.8% 4.6% 8/31/2024 365 X 0 |
| IEFV.L | iShares IV plc Edge MSCI Europe Value Factor UCITS ETF Acc | | GBX | ETF | 636 | £9.25 | Source: Yahoo | £4,715.94 | £5,884.27 | £1,168.33 | 24.8% 13.1% 8/31/2024 365 X 0 |
| JEGI.L | JPMorgan European Growth & Income plc ORD GBP0.005 | | GBX | Equity | 4,101 | £1.27 | Source: Stooq | £4,242.48 | £5,187.77 | £945.29 | 22.3% 11.5% 8/31/2024 365 X 0 |
| MINV.L | iShares VI plc Edge MSCI World Minimum Volatility UCITS ETF Acc | | GBX | ETF | 37 | £54.18 | Source: Yahoo | £1,926.59 | £2,004.66 | £78.07 | 4.1% 4.5% 8/31/2024 365 X 0 |
| SERE.L | Schroder European Real Estate Investment Trust plc Ordinary 10p | | GBX | Real Estate | 4,409 | £0.65 | Source: Stooq | £2,828.37 | £2,874.67 | £46.30 | 1.6% 6.4% 8/31/2024 365 X 0 |

alex • SIPP — £11,953.56

Range:7d30d180d

View:AllETFEquityBond

Quick Filters:Sell-eligible

Columns:UnitsCost £Mkt £Gain £Gain %

| All | Yes | No | | | | | | | | | |
|----------|--|-----------|-----|------|----------|---------|---------------|-----------|-----------|--------------|---------------------------------------|
| Ticker ▲ | Name | Trend | CCY | Type | Units | Px £ | Cost £ | Mkt £ | Gain £ | Gain % | Weight % |
| Acquired | Days Held | Eligible? | | | | | | | | | |
| CASH.GBP | Cash (GBP) | | GBP | Cash | 2,729.52 | £1.00 | £2,729.52 | £2,729.52 | £0.00 | 0.0% 22.8% | — — ✓ Eligible |
| ERNS.L | iShares IV plc GBP Ultrashort Bond UCITS ETF GBP Dist | | GBP | ETF | 38 | £101.59 | Source: Stooq | £3,671.94 | £3,860.42 | £188.48 | 5.1% 32.3% 8/31/2024 365 X 0 |
| IEFV.L | iShares IV plc Edge MSCI Europe Value Factor UCITS ETF Acc | | GBX | ETF | 231 | £9.25 | Source: Yahoo | £1,712.87 | £2,137.21 | £424.34 | 24.8% 17.9% 8/31/2024 365 X 0 |
| SPGP.L | iShares V plc Gold Producers UCITS ETF Acc (GBP) | | GBX | ETF | 54 | £21.34 | Source: Stooq | £711.59 | £1,152.09 | £440.50 | 61.9% 9.6% 8/31/2024 365 X 0 |
| VWRL.L | Vanguard FTSE All-World UCITS ETF (GBP) | | GBP | ETF | 18 | £115.24 | Source: Stooq | | | | |

£1,834.74 | £2,074.32 | £239.58 | 13.1% | 17.4% | 8/31/2024 | 365 | X 0 |

joe • SIPP — £11,958.22

Range:7d30d180d

View:AllETFsEquityBond

Quick Filters: Sell-eligible

Columns:UnitsCost £Mkt £Gain £Gain %

| All Yes/No | | | | | | | | | | | |
|---------------|--|------------|---------|-------|----------|-----------|-----------|-----------|--------|--------|----------|
| | | | | | | | | | | | |
| Ticker ▲ | Name | Trend | CCY | Type | Units | Px £ | Cost £ | Mkt £ | Gain £ | Gain % | Weight % |
| Acquired | Days Held | Eligible? | | | | | | | | | |
| CASH.GBP | Cash (GBP) | | GBP | Cash | 2,734.18 | £1.00 | £2,734.18 | £2,734.18 | £0.00 | 0.0% | 22.9% |
| — | — | ✓ Eligible | | | | | | | | | |
| ERNS.L | iShares IV plc GBP Ultrashort Bond UCITS ETF GBP Dist | | | GBP | | | | | | 38 | £101.59 |
| Source: Stooq | £3,671.94 | £3,860.42 | £188.48 | 5.1% | 32.3% | 8/31/2024 | 365 | X 0 | | | |
| IEFV.L | iShares IV plc Edge MSCI Europe Value Factor UCITS ETF Acc | | | GBX | | | | | | 231 | £9.25 |
| Source: Yahoo | £1,712.87 | £2,137.21 | £424.34 | 24.8% | 17.9% | 8/31/2024 | 365 | X 0 | | | |
| SPGP.L | iShares V plc Gold Producers UCITS ETF Acc (GBP) | | | GBX | | | | | | 54 | £21.34 |
| Source: Stooq | £711.59 | £1,152.09 | £440.50 | 61.9% | 9.6% | 8/31/2024 | 365 | X 0 | | | |
| VWRL.L | Vanguard FTSE All-World UCITS ETF (GBP) | | | GBP | | | | | | 18 | £115.24 |
| Source: Stooq | £1,834.74 | £2,074.32 | £239.58 | 13.1% | 17.3% | 8/31/2024 | 365 | X 0 | | | |

lucy • — £0.00

Range:7d30d180d

View: All ETF Equity Bond

Quick Filters: Sell-eligible

Columns:UnitsCost £Mkt £Gain £Gain %

No holdings match the current filters.

011 http://localhost:8000/

http://localhost:8000/

URL: http://localhost:8000/

```

{"detail":"Not Found"}

```

012 Allotmint API - Swagger UI

<http://localhost:8000/docs>

URL: <http://localhost:8000/docs>

Failed to load API definition.

...

Errors

Hide

Fetch error

Internal Server Error /openapi.json

...