

# Site Manual

Generated: 2025-08-31 13:51 UTC

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001 AllotMint - Watch your money grow

<http://localhost:5173/movers>

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

**\*\*Alerts\*\***

Threshold %: Save

- \* : SELL B.N: RSI 76.13 above 70
- \* : SELL BBAI.N: Price dropped -7.82% in last 7d
- \* : SELL BIIB.N: Price dropped -5.09% in last 7d
- \* : SELL BPCR.L: RSI 79.52 above 70
- \* : SELL ERNS.L: RSI 77.66 above 70
- \* : BUY FSFL.L: RSI 27.26 below 30
- \* : BUY GBPG.L: RSI 26.00 below 30
- \* : BUY IBZL.L: Price gained 5.96% in last 7d
- \* : SELL IFX.DE: Price dropped -5.13% in last 7d
- \* : BUY IONQ.N: Price gained 7.44% in last 7d
- \* : BUY NESF.L: RSI 23.51 below 30
- \* : SELL SN.L: RSI 78.77 above 70
- \* : BUY SPGP.L: Price gained 5.38% in last 7d
- \* : BUY THX.L: Price gained 20.40% in last 7d
- \* : BUY UKW.L: RSI 29.13 below 30
- \* : SELL WIX.L: Price dropped -8.86% 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)[Support](/support)[Scenario Tester](/scenario)

Refresh Prices

Failed to load movers (HTTP 400): Bad Request  
(<http://localhost:8000/portfolio-group/all/movers?days=1&limit=10>)

002 AllotMint - Watch your money grow  
http://localhost:5173/instrument/all  
URL: http://localhost:5173/instrument/all

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Refresh Prices

Group:All owners combinedAdultsChildren

Columns:UnitsCostMarketGainGain %

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\$0.25	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%	£19.72	8/29/2025	—	—
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 Inflation 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 EUR0.22 | 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 &#39;B&#39; 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	—	—		
VHYL.L	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>

## **\*\*Alerts\*\***

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Refresh Prices

Owner:alexjoelucysteve

Portfolio: alex

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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:AllETFEquityBond

Quick Filters:Sell-eligible

Columns:UnitsCost £Mkt £Gain £Gain %

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SIPP (GBP)  
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Est Value: £11,953.56

Last updated: 8/6/2025

Range:7d30d180d

View:AllETFEquityBond

Quick Filters:Sell-eligible

Columns:UnitsCost £Mkt £Gain £Gain %



[illegible]

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

**\*\*Alerts\*\***

Threshold %: Save

- \* : SELL B.N: RSI 76.13 above 70
- \* : SELL BBAI.N: Price dropped -7.82% in last 7d
- \* : SELL BIIB.N: Price dropped -5.09% in last 7d
- \* : SELL BPCR.L: RSI 79.52 above 70
- \* : SELL ERNS.L: RSI 77.66 above 70
- \* : BUY FSFL.L: RSI 27.26 below 30
- \* : BUY GBPG.L: RSI 26.00 below 30
- \* : BUY IBZL.L: Price gained 5.96% in last 7d
- \* : SELL IFX.DE: Price dropped -5.13% in last 7d
- \* : BUY IONQ.N: Price gained 7.44% in last 7d
- \* : BUY NESF.L: RSI 23.51 below 30
- \* : SELL SN.L: RSI 78.77 above 70
- \* : BUY SPGP.L: Price gained 5.38% in last 7d
- \* : BUY THX.L: Price gained 20.40% in last 7d
- \* : BUY UKW.L: RSI 29.13 below 30
- \* : SELL WIX.L: Price dropped -8.86% 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)[Support](/support)[Scenario Tester](/scenario)

Refresh Prices

Timeseries Editor  
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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>

**\*\*Alerts\*\***

Threshold %: Save

- \* : SELL B.N: RSI 76.13 above 70
- \* : SELL BBAI.N: Price dropped -7.82% in last 7d
- \* : SELL BIIB.N: Price dropped -5.09% in last 7d
- \* : SELL BPCR.L: RSI 79.52 above 70
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[Movers](/movers)[Group](/movers)[Instrument](/instrument)[Member](/member)[Timeseries](/timeseries)[Data Admin](/dataadmin)[Reports](/reports)[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/support>

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

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

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#/>)

Configuration

-----

### Tabs Enabled

instrumentperformancetransactionsscreenertradingtimeserieswatchlistvirtualsupportreports

### Other Switches

reloadskip\\_snapshot\\_warm\selenium\\_headlessoffline\\_modedisable\\_authrelative\\_view\\_enabled

### Other parameters

themedarklightssystem

Save

Telegram Message

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Send

008 AllotMint - Watch your money grow

<http://localhost:5173/scenario>

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

**\*\*Alerts\*\***

Threshold %: Save

- \* : SELL B.N: RSI 76.13 above 70
- \* : SELL BBAI.N: Price dropped -7.82% in last 7d
- \* : SELL BIIB.N: Price dropped -5.09% in last 7d
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[Movers](/movers)[Group](/movers)[Instrument](/instrument)[Member](/member)[Timeseries](/timeseries)[Data Admin](/dataadmin)[Reports](/reports)[Support](/support)[Scenario Tester](/scenario)

Refresh Prices

Apply

009 AllotMint - Watch your money grow

<http://localhost:5173/?group=all>

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

**\*\*Alerts\*\***

Threshold %: Save

\* : SELL B.N: RSI 76.13 above 70  
\* : SELL BBAI.N: Price dropped -7.82% in last 7d  
\* : SELL BIIB.N: Price dropped -5.09% in last 7d  
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\* : 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)[Support](/support)[Scenario Tester](/scenario)

Refresh Prices

Group:All owners combinedAdultsChildren

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

UnknownFinancialsMiscellaneousIndustrialsReal Estate Investment TrustsCommodities - Energy-100000100002000030000

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 %

														All	Yes	No
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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	£3.41	Source: 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	£264.19	Source: 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	£36.26	Source: 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	✕ 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	✕ 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	✕ 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	✕ 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	✕ 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	✕ 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	✕ 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	✕ 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	✕ 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	✕ 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	✕ 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	✕ 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	✕ 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	✕ 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	✕ 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	✕ 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	✕ 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	✕ 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	✕ 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	✕ 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 |  
 | ILL.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 EUR0.22 | | 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 |

																		AllYesNo					
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	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		£3.41		Source: 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 | ✕ 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 | ✕ 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 | ✕ 0 |

| CASH.GBP | Cash (GBP) | | GBP | Cash | 17,199.46 | £1.00 | £17,199.46 | £17,199.46 | £0.00 | 0.0% | 21.6% | — | — | ✓ Eligible |

| CUKS.L | iShares VII plc MSCI UK Small CAP UCITS ETF | | GBX | ETF | 7 | £247.90Source: Stooq | £1,660.05 | £1,735.30 | £75.25 | 4.5% | 2.2% | 8/31/2024 | 365 | ✕ 0 |

| ESIH.L | iShares VI plc MSCI EUR HealthCare Sect UCITS ETF Acc | | GBP | ETF | 351 | £5.62Source: Yahoo | £2,295.54 | £1,972.62 | -£322.92 | -14.1% | 2.5% | 8/31/2024 | 365 | ✕ 0 |

| FSFL.L | Foresight Solar Fund Ltd Ordinary NPV | | GBX | Fund | 4,410 | £0.82Source: Stooq | £4,123.79 | £3,602.97 | -£520.82 | -12.6% | 4.5% | 8/31/2024 | 365 | ✕ 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 | ✕ 0 |

| HFD.L | Halfords Group plc | | GBX | Equity | 100 | £1.37Source: Stooq | £139.92 | £137.00 | -£2.92 | -2.1% | 0.2% | 8/31/2024 | 365 | ✕ 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 | ✕ 0 |

| JEGI.L | JPMorgan European Growth & Income plc ORD GBP0.005 | | GBX | Equity | 4,096 | £1.27Source: Stooq | £4,237.31 | £5,181.44 | £944.13 | 22.3% | 6.5% | 8/31/2024 | 365 | ✕ 0 |

| REC.L | Record Plc | | GBX | Equity | 5,467 | £0.61Source: Stooq | £3,496.15 | £3,334.87 | -£161.28 | -4.6% | 4.2% | 8/31/2024 | 365 | ✕ 0 |

| SERE.L | Schroder European Real Estate Investment Trust plc Ordinary 10p | | GBX | Real Estate | 5,889 | £0.65Source: Stooq | £3,777.79 | £3,839.63 | £61.84 | 1.6% | 4.8% | 8/31/2024 | 365 | ✕ 0 |

| SPGP.L | iShares V plc Gold Producers UCITS ETF Acc (GBP) | | GBX | ETF | 109 | £21.34Source: Stooq | £1,436.35 | £2,325.51 | £889.16 | 61.9% | 2.9% | 8/31/2024 | 365 | ✕ 0 |

| THX.L | Thor Explorations Ltd NPV (DI) | | GBX | Equity | 5,126 | £0.60Source: Stooq | £896.54 | £3,055.10 | £2,158.56 | 240.8% | 3.8% | 8/31/2024 | 365 | ✕ 0 |

| UKW.L | Greencoat UK Wind plc Ordinary 1p | | GBX | Equity | 3,601 | £1.09Source: Stooq | £5,052.56 | £3,928.69 | -£1,123.87 | -22.2% | 4.9% | 8/31/2024 | 365 | ✕ 0 |

### lucy • ISA — £79,260.88

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? |

| 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 | ✕ 0 |

| CASH.GBP | Cash (GBP) | | GBP | Cash | 11,661.61 | £1.00 | £11,661.61 | £11,661.61 | £0.00 |

| 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 |

Range:7d30d180d

Quick Filters: Sell-eligible

																AllYesNo		
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	Ticker ▲		Name		Trend		CCY		Type		Units		Px £		Cost £		Mkt £	
	Acquired		Days Held		Eligible?													
	CASH.GBP		Cash (GBP)				GBP		Cash		11,861.77		£1.00		£11,861.77		£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		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%		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 | £0.65Source: 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			
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	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		✗ 0								
	ERNS.L		iShares IV plc GBP Ultrashort Bond UCITS ETF GBP Dist				GBP		ETF		150				Source: Stooq		£14,494.50		£15,238.50		£744.00		5.1%
	£101.59						33.9%		8/31/2024		365		✗ 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		✗ 0										
	IEFV.L		iShares IV plc Edge MSCI Europe Value Factor UCITS ETF Acc				GBX		ETF		636				Source: Yahoo		£4,715.94		£5,884.27		£1,168.33		24.8%
	£9.25						13.1%		8/31/2024		365		✗ 0										
	JEGI.L		JPMorgan European Growth & Income plc ORD GBP0.005				GBX		Equity		4,101				Source: Stooq		£4,242.48		£5,187.77		£945.29		22.3%
	£1.27						11.5%		8/31/2024		365		✗ 0										
	MINV.L		iShares VI plc Edge MSCI World Minimum Volatility UCITS ETF Acc				GBX		ETF		37				Source: Yahoo		£1,926.59		£2,004.66		£78.07		4.1%
	£54.18						4.5%		8/31/2024		365		✗ 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		✗ 0										

### alex • SIPP — £11,953.56

Range:7d30d180d

View:AllETFEquityBond

Quick Filters:Sell-eligible

Columns:UnitsCost £Mkt £Gain £Gain %

																		All	Yes	No		
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	Ticker ▲		Name		Trend		CCY		Type		Units		Px £		Cost £		Mkt £		Gain £		Gain %	
	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%	
	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	✕ 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	✕ 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	✕ 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	✕ 0

### joe • SIPP — £11,958.22

Range:7d30d180d

View:AllETFEquityBond

Quick Filters:Sell-eligible

Columns:UnitsCost £Mkt £Gain £Gain %

																	All	Yes	No	
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	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   ETF   38																			
	£101.59Source: Stooq   £3,671.94   £3,860.42   £188.48   5.1%   32.3%   8/31/2024   365   ✕ 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   ✕ 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   ✕ 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%   17.3%   8/31/2024   365   ✕ 0																			

### lucy • — £0.00

Range:7d30d180d

View:AllETFEquityBond

Quick Filters:Sell-eligible

Columns:UnitsCost £Mkt £Gain £Gain %

No holdings match the current filters.

010 http://localhost:8000/  
http://localhost:8000/  
URL: http://localhost:8000/

```

{"detail":"Not Found"}

```



011 Allotmint API - Swagger UI

<http://localhost:8000/docs>

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

Allotmint API

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1.0

```

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OAS 3.1

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</openapi.json>

Authorize

### [portfolio](#/portfolio)

GET

[/owners](#/portfolio/owners\_owners\_get)

Owners

GET

[/groups](#/portfolio/groups\_groups\_get)

Groups

GET

[/portfolio/{owner}](#/portfolio/portfolio\_portfolio\_\_owner\_\_get)

Portfolio

GET

[/var/{owner}](#/portfolio/portfolio\_var\_var\_\_owner\_\_get)

Portfolio Var

POST

[/var/{owner}/recompute](#/portfolio/portfolio\_var\_recompute\_var\_\_owner\_\_recompute\_post)

Portfolio Var Recompute

GET

[/portfolio-group/{slug}](#/portfolio/portfolio\_group\_portfolio\_group\_\_slug\_\_get)

Portfolio Group

GET

[/portfolio-group/{slug}/instruments](#/portfolio/group\_instruments\_portfolio\_group\_\_slug\_\_instruments\_get)

Group Instruments

GET

[/portfolio-group/{slug}/sectors](#/portfolio/group\_sectors\_portfolio\_group\_\_slug\_\_sectors\_get)

Group Sectors

GET

[/portfolio-group/{slug}/regions](#/portfolio/group\_regions\_portfolio\_group\_\_slug\_\_regions\_get)

Group Regions

GET

[/portfolio-group/{slug}/movers](#/portfolio/group\_movers\_portfolio\_group\_\_slug\_\_movers\_get)

Group Movers

GET

[/account/{owner}/{account}](#/portfolio/get\_account\_account\_\_owner\_\_account\_\_get)

Get Account

GET

[/portfolio-group/{slug}/instrument/{ticker}](#/portfolio/instrument\_detail\_portfolio\_group\_\_slug\_\_instrument\_\_ticker\_\_get)

Instrument Detail

GET

[/prices/refresh](#/portfolio/refresh\_prices\_prices\_refresh\_post)

Refresh Prices

POST

[/prices/refresh](#/portfolio/refresh\_prices\_prices\_refresh\_post)

Refresh Prices

### [performance](#/performance)

GET

[/performance/{owner}/alpha](#/performance/owner\_alpha\_performance\_\_owner\_\_alpha\_get)

Owner Alpha

GET

[/performance/{owner}/tracking-error](#/performance/owner\_tracking\_error\_performance\_\_owner\_\_tracking\_error\_get)

Owner Tracking Error

GET

[/performance/{owner}/max-drawdown](#/performance/owner\_max\_drawdown\_performance\_\_owner\_\_max\_drawdown\_get)

Owner Max Drawdown

GET

[/performance-group/{slug}/alpha](#/performance/group\_alpha\_performance\_group\_\_slug\_\_alpha\_get)

Group Alpha

GET

[/performance-group/{slug}/tracking-error](#/performance/group\_tracking\_error\_performance\_group\_\_slug\_\_tracking\_error\_get)

Group Tracking Error

GET

[/performance-group/{slug}/max-drawdown](#/performance/group\_max\_drawdown\_performance\_group\_\_slug\_\_max\_drawdown\_get)

Group Max Drawdown

GET

[/performance/{owner}](#/performance/performance\_performance\_\_owner\_\_get)

Performance

### [instrument](#/instrument)

GET

[/instrument/](#/instrument/instrument\_instrument\_\_get)

Instrument

### [timeseries](#/timeseries)

GET

[/timeseries/meta](#/timeseries/get\_meta\_timeseries\_timeseries\_meta\_get)

Get Meta Timeseries

GET

[/timeseries/html](#/timeseries/yahoo\_timeseries\_html\_timeseries\_html\_get)

Yahoo Timeseries Html

GET

[/timeseries/edit](#/timeseries/get\_timeseries\_edit\_timeseries\_edit\_get)

Get Timeseries Edit

POST

[/timeseries/edit](#/timeseries/post\_timeseries\_edit\_timeseries\_edit\_post)

Post Timeseries Edit

GET

[/timeseries/admin](#/timeseries/timeseries\_admin\_timeseries\_admin\_get)

Timeseries Admin

POST

[/timeseries/admin/{ticker}/{exchange}/refetch](#/timeseries/refetch\_timeseries\_timeseries\_admin\_\_ticker\_\_exchange\_\_refetch\_post)

Refetch Timeseries

POST

[/timeseries/admin/{ticker}/{exchange}/rebuild\_cache](#/timeseries/rebuild\_cache\_timeseries\_admin\_\_ticker\_\_exchange\_\_rebuild\_cache\_post)

Rebuild Cache

### [transactions](#/transactions)

GET

[/transactions](#/transactions/list\_transactions\_transactions\_get)

List Transactions

### [alerts](#/alerts)

GET

[/alert-thresholds/{user}](#/alerts/get\_threshold\_alert\_thresholds\_\_user\_\_get)

Get Threshold

POST

[/alert-thresholds/{user}](#/alerts/set\_threshold\_alert\_thresholds\_\_user\_\_post)

Set Threshold

GET

[/alerts/](#/alerts/alerts\_alerts\_\_get)

Alerts

GET

[/alerts/settings/{user}](#/alerts/get\_settings\_alerts\_settings\_\_user\_\_get)

Get Settings

POST

[/alerts/settings/{user}](#/alerts/set\_settings\_alerts\_settings\_\_user\_\_post)

Set Settings

### [compliance](#/compliance)

GET

[/compliance/{owner}](#/compliance/compliance\_for\_owner\_compliance\_\_owner\_\_get)

Compliance For Owner

### [screener](#/screener)

GET

[/screener/](#/screener/screener\_screener\_\_get)

Screener

### [support](#/support)

POST

[/support/telegram](#/support/post\_telegram\_support\_telegram\_post)

Post Telegram

### [query](#/query)

POST

[/custom-query/run](#/query/run\_query\_custom\_query\_run\_post)

Run Query

GET

[/custom-query/saved](#/query/list\_saved\_queries\_custom\_query\_saved\_get)

List Saved Queries

GET

[/custom-query/{slug}](#/query/load\_query\_custom\_query\_\_slug\_\_get)

Load Query

POST

[/custom-query/{slug}](#/query/save\_query\_custom\_query\_\_slug\_\_post)

Save Query

### [virtual-portfolios](#/virtual-portfolios)

GET

[/virtual-portfolios](#/virtual-portfolios/list\_virtual\_portfolios\_virtual\_portfolios\_get)

List Virtual Portfolios

POST

[/virtual-portfolios](#/virtual-portfolios/create\_or\_update\_virtual\_portfolio\_virtual\_portfolios\_post  
)

Create Or Update Virtual Portfolio

GET

[/virtual-portfolios/{vp\\_id}](#/virtual-portfolios/get\_virtual\_portfolio\_virtual\_portfolios\_\_vp\_id\_\_g

et)

Get Virtual Portfolio

DELETE

[/virtual-portfolios/{vp\\_id}](#/virtual-portfolios/delete\_virtual\_portfolio\_route\_virtual\_portfolios\\_vp\\_id\\_delete)

Delete Virtual Portfolio Route

### [metrics](#/metrics)

GET

[/metrics/{owner}](#/metrics/get\_metrics\_metrics\_\_owner\_\_get)

Get Metrics

### [agent](#/agent)

GET

[/agent/stats](#/agent/agent\_stats\_agent\_stats\_get)

Agent Stats

### [trading-agent](#/trading-agent)

GET

[/trading-agent/signals](#/trading-agent/signals\_trading\_agent\_signals\_get)

Signals

### [config](#/config)

GET

[/config](#/config/read\_config\_config\_get)

Read Config

PUT

[/config](#/config/update\_config\_config\_put)

Update Config

### [default](#/default)

GET

[/api/quotes](#/default/get\_quotes\_api\_quotes\_get)

Get Quotes

POST

[/token](#/default/login\_token\_post)

Login

GET

[/health](#/default/health\_health\_get)

Health

### [movers](#/movers)

GET

[/movers](#/movers/get\_movers\_movers\_get)

Get Movers

### [scenario](#/scenario)

GET

[/scenario](#/scenario/run\_scenario\_scenario\_get)

Run Scenario

#### Schemas

Body\\_login\\_token\\_post

Expand all\*\*object\*\*

CustomQuery

Expand all\*\*object\*\*

Fundamentals

Expand all\*\*object\*\*

GroupSummary

Expand all\*\*object\*\*

HTTPValidationError

Expand all\*\*object\*\*



Mover

Expand all\*\*object\*\*

MoversResponse

Expand all\*\*object\*\*

OwnerSummary

Expand all\*\*object\*\*

TelegramRequest

Expand all\*\*object\*\*

ThresholdPayload

Expand all\*\*object\*\*

ValidationError

Expand all\*\*object\*\*

VirtualHolding

Expand all\*\*object\*\*

VirtualPortfolio

Expand all\*\*object\*\*

VirtualPortfolioSummary

Expand all\*\*object\*\*