



Overview Tracker



£25,000
Lump sum

£1,000
Monthly

£100,000
Target

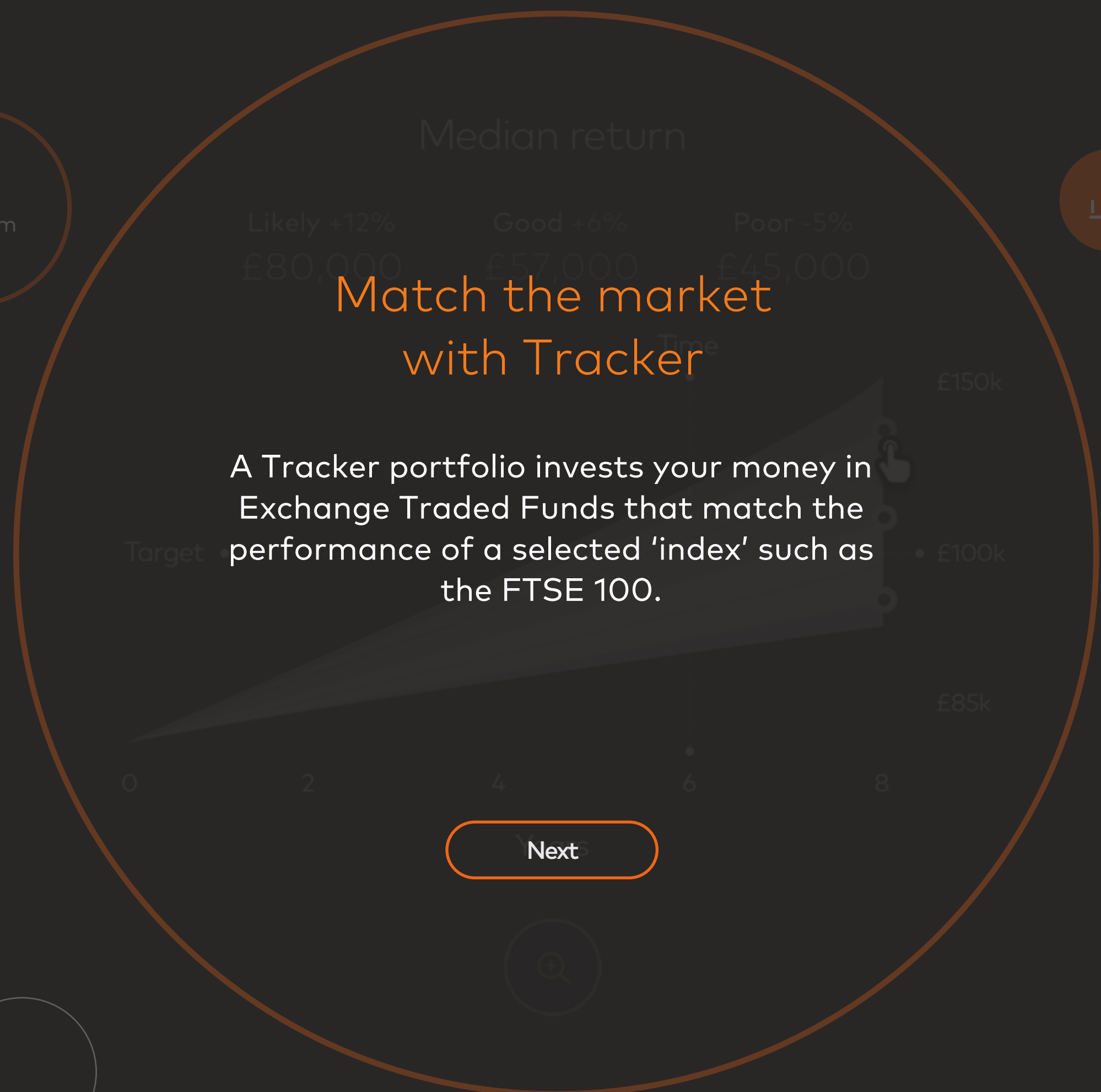
?

3
Medium
Risk

Tracker

Active

Active+



Invest Now

Save & Exit



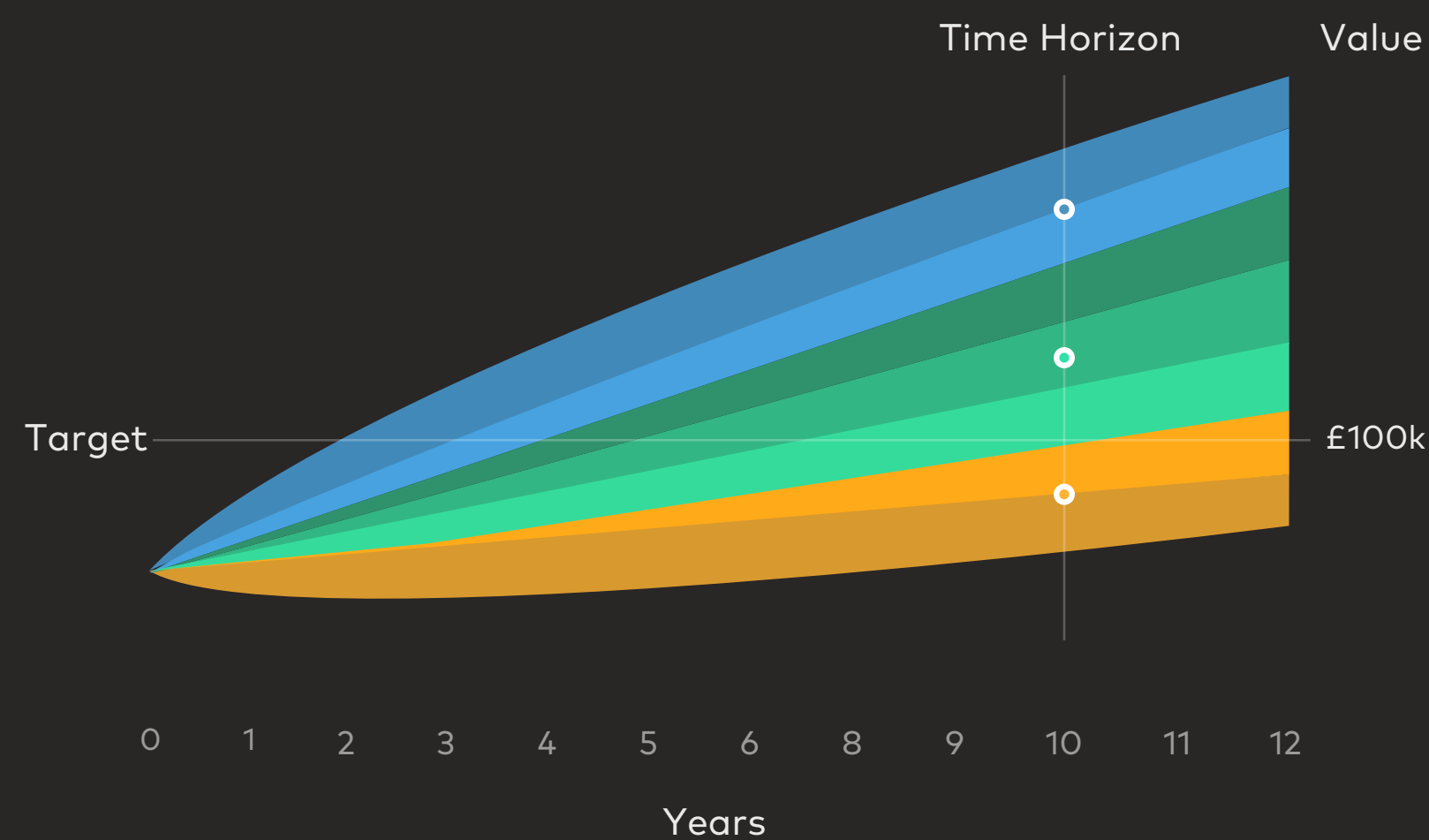
Performance Future

In 10 investment years

Good
£168,000

Likely
£160,000

Poor
£155,000



10

3
Medium
Risk

Tracker

Active

Active+

£25,000
Lump sum

£1,000
Monthly

£100,000
Target

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Invest Now

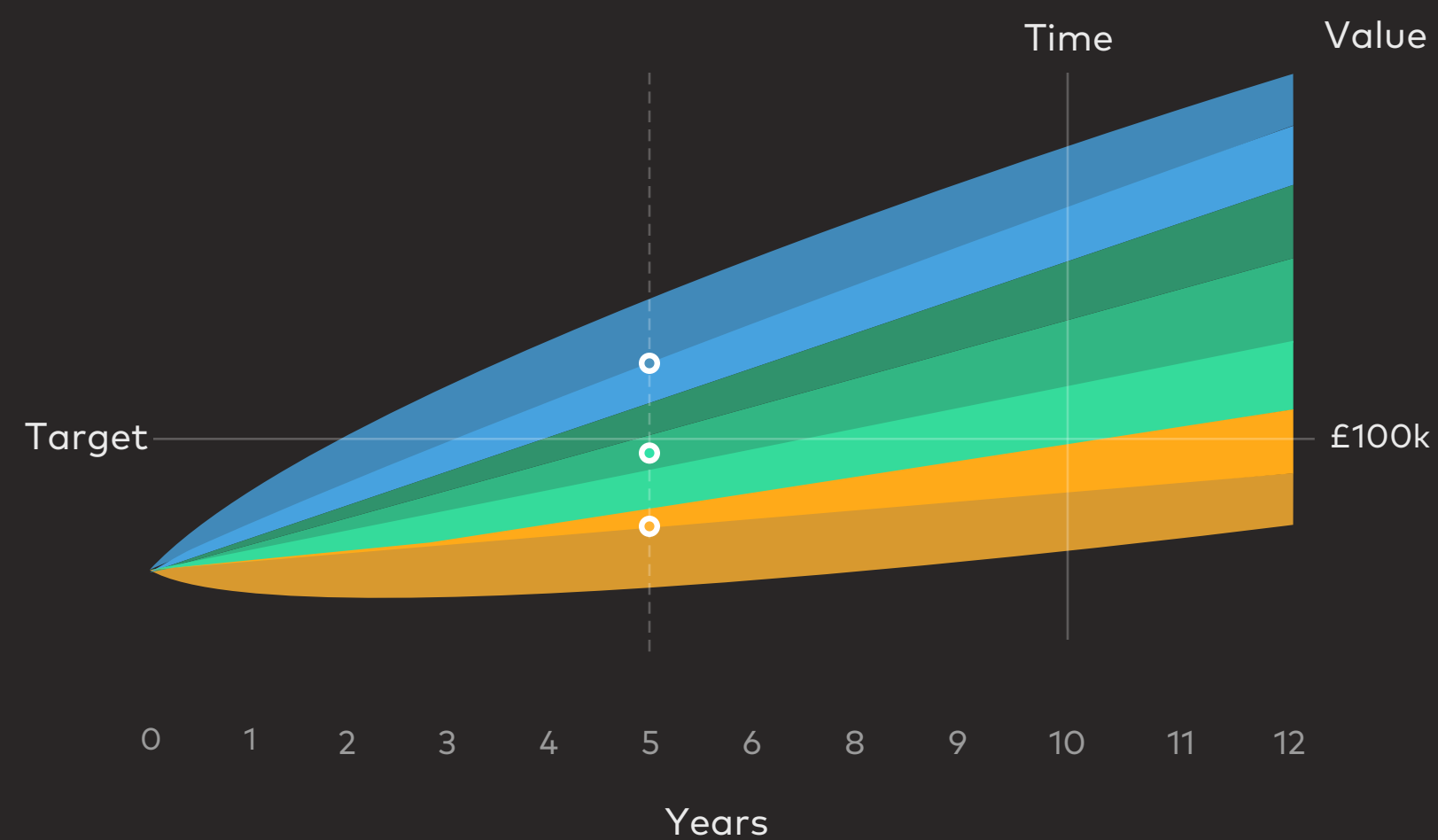
Save & Exit



Performance Future

In 5 years of 10

Good £92,000
Likely £88,000
Poor £84,000



10



3

Medium
Risk



Tracker

Active

Active+

£25,000
Lump sum

£1,000
Monthly

£100,000
Target

?

Invest Now

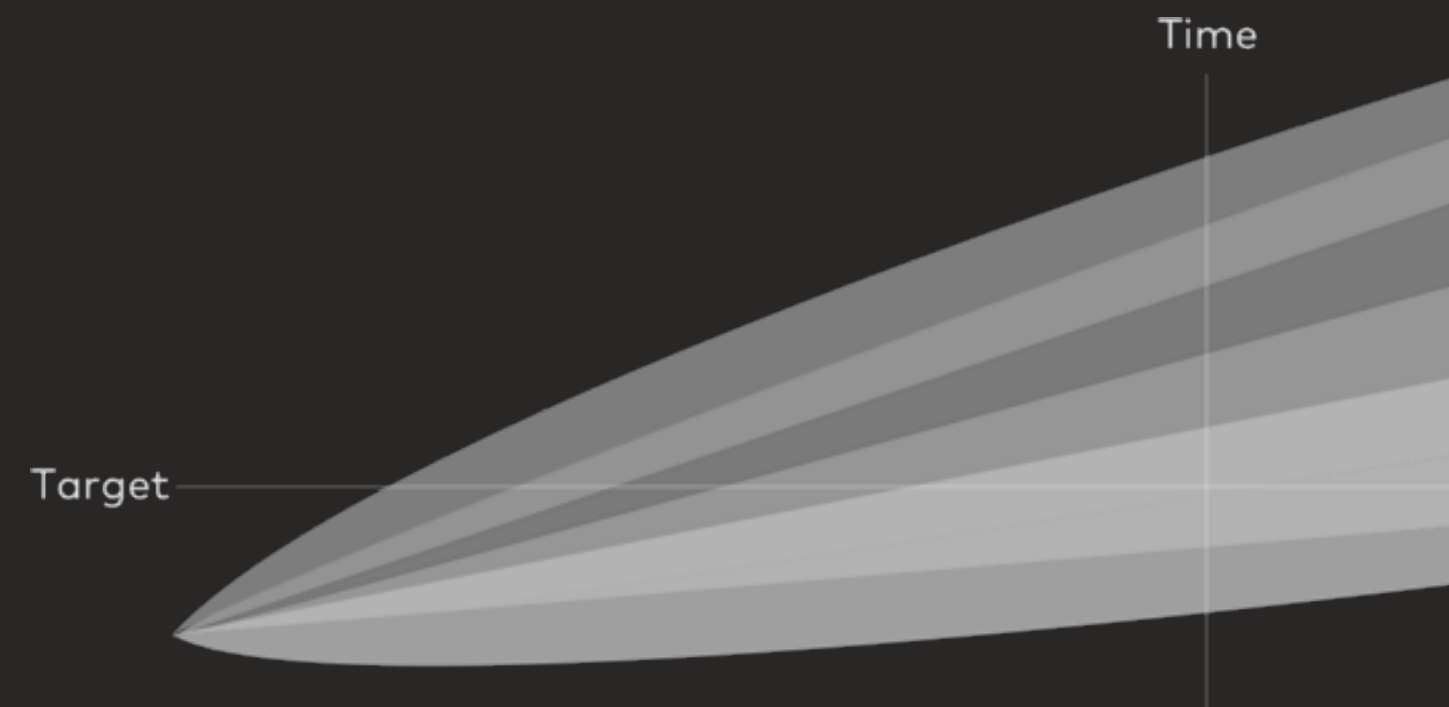
Save & Exit



Performance Future

In 12 investment years

Good	Likely	Poor
£97,000	£92,000	£85,000



12
Investment
years

3

Medium
Risk



Tracker

Active

Active+

£25,000
Lump sum

£1,000
Monthly

£100,000
Target

?

Invest Now

Save & Exit



Performance Future

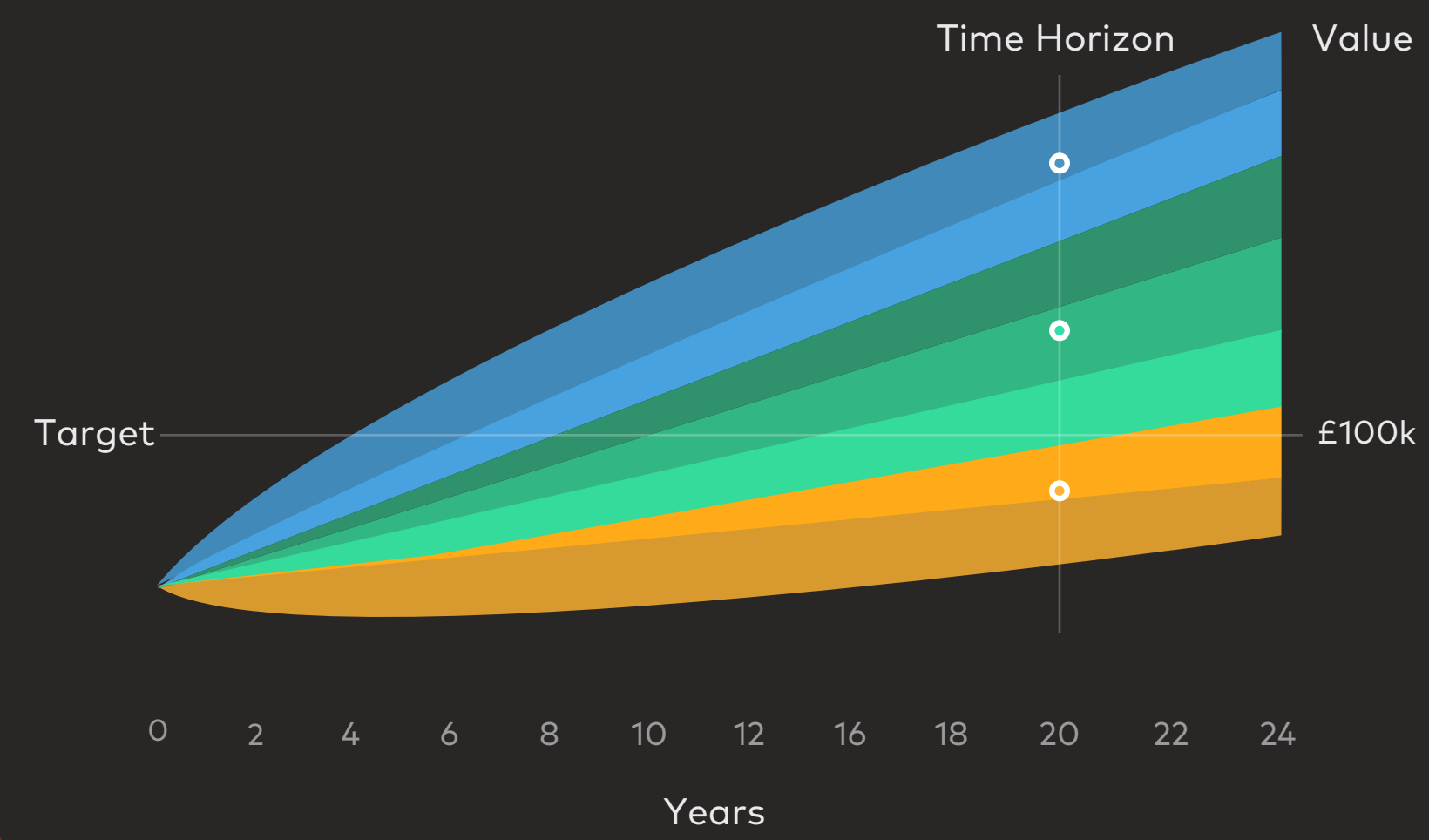


In 10 investment years

Good
£168,000

Likely
£160,000

Poor
£155,000



3
Medium
Risk

Tracker

Active

Active+

£25,000
Lump sum

£1,000
Monthly

£100,000
Target

?



20

Invest Now

Save & Exit

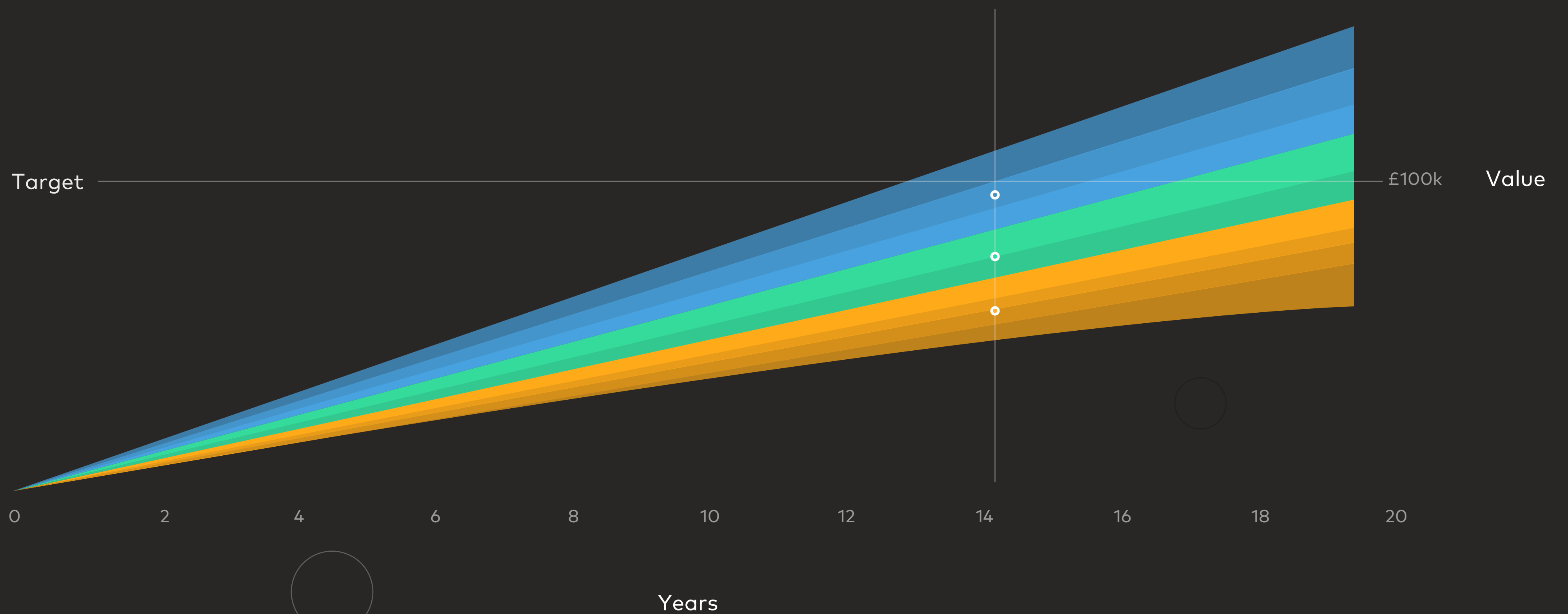


Performance Future

Good Likely Poor

£65,000 £91,000 £45,000

Time horizon



£25,000
Lump sum

£1,000
Monthly

£100,000
Target

10
Years

?



Performance Past

£25,000
Lump sum

3

Medium
Risk

Tracker

Active

Active+

£100,000
Target

?

Value

£40k

£30k

£20k

£10k

2006

2009

2012

2014

2016

Years

My Portfolio

Dow Jones



10

Invest Now

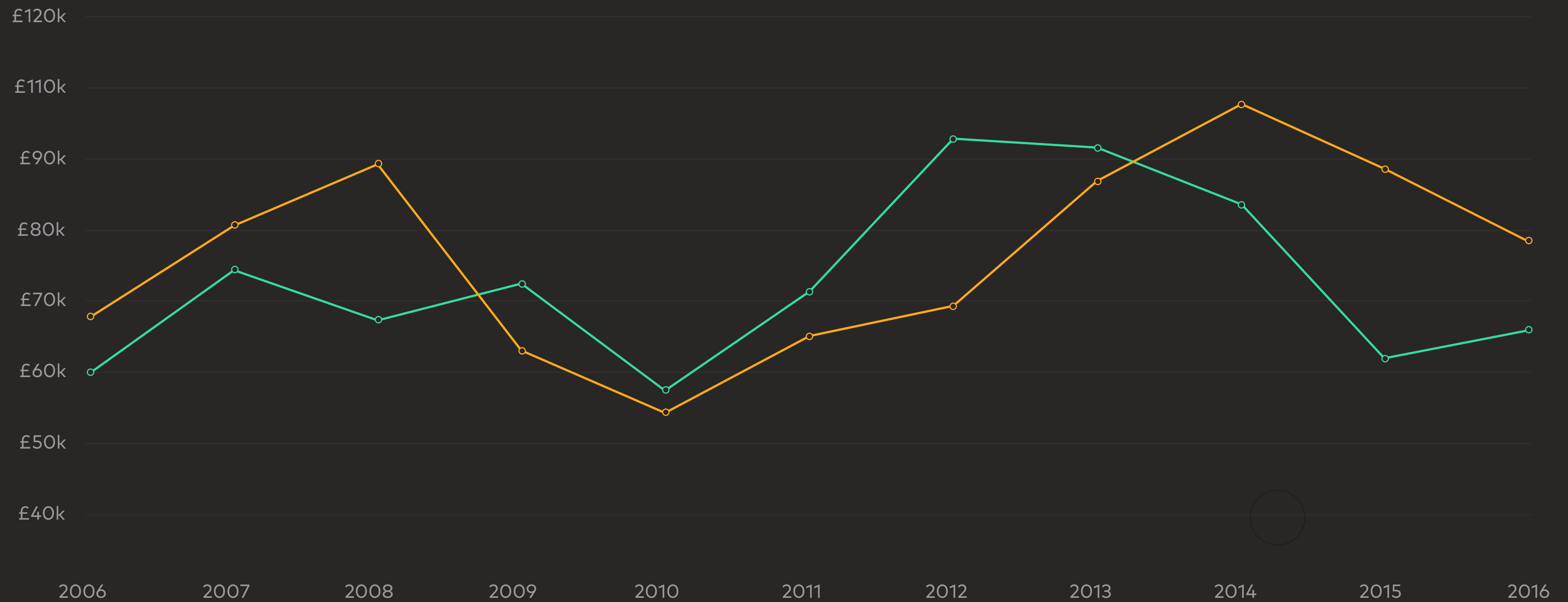
Save & Exit



Performance Past

My Portfolio

Dow Jones



£25,000
Lump sum

£1,000
Monthly

£100,000
Target

10
Years

?



Portfolio Asset Allocation



£25,000
Lump sum

£1,000
Monthly

£100,000
Target

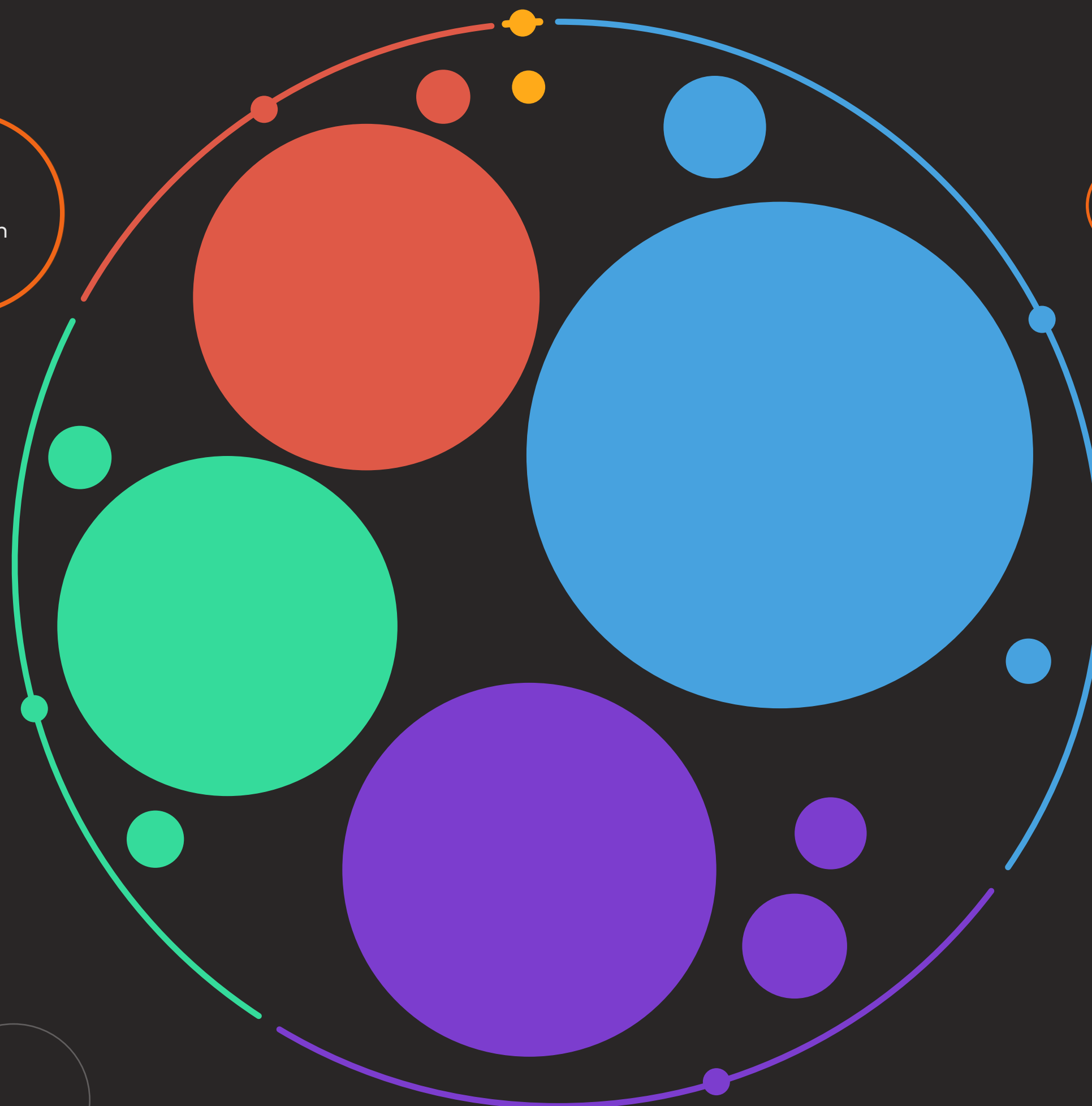
?

3
Medium
Risk

Tracker

Active

Active+



- 40% Commodities
- 30% Equities
- 20% Bonds
- 9% Cash
- 1% Other

Invest Now

Save & Exit



Portfolio Asset Allocation



£25,000
Lump sum

£1,000
Monthly

£100,000
Target

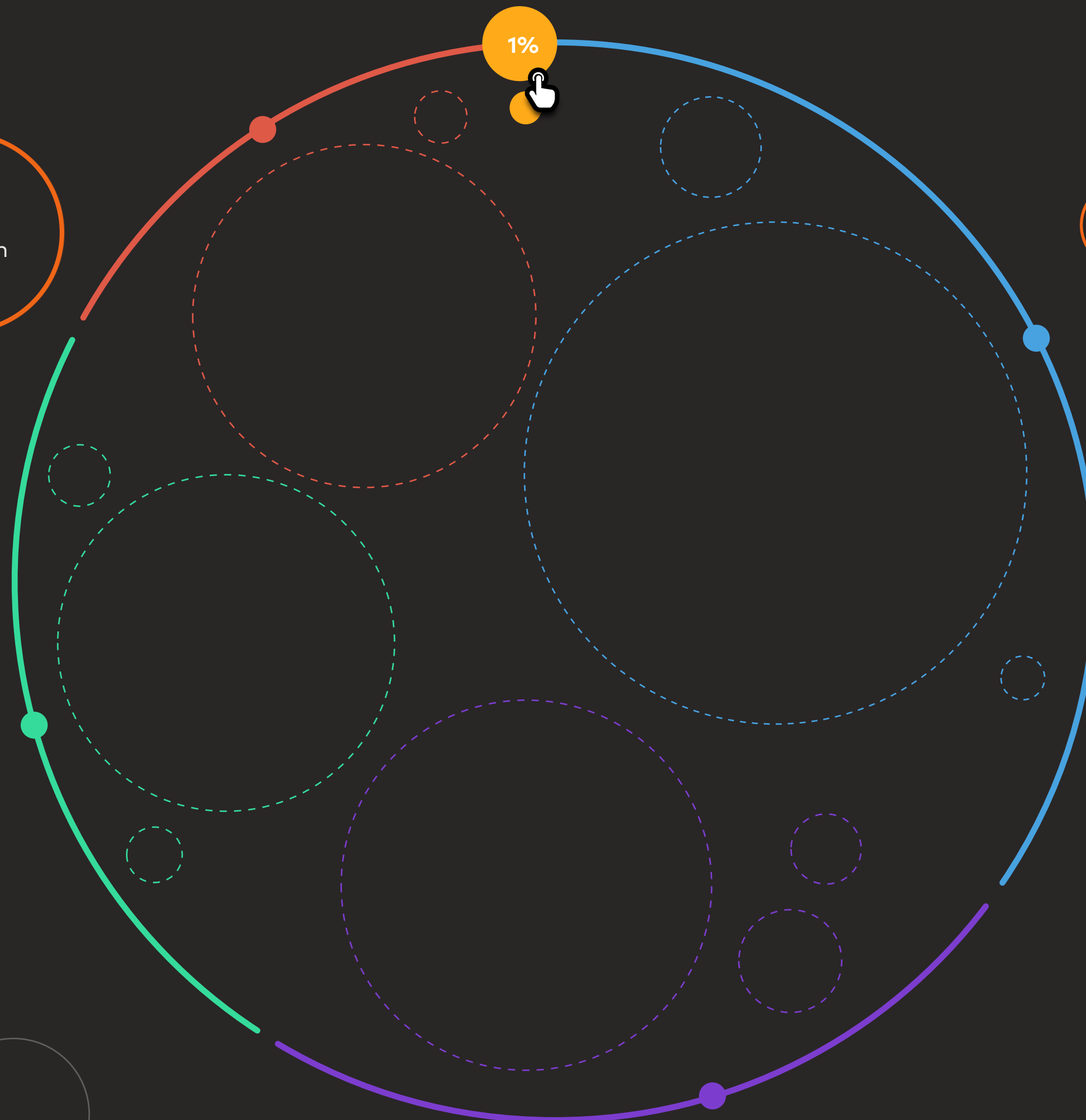
?

3
Medium
Risk

Tracker

Active

Active+



- 40% Commodities
- 30% Equities
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- 9% Cash
- 1% Other

Invest Now

Save & Exit



Portfolio Asset Allocation



£25,000
Lump sum

£1,000
Monthly

£100,000
Target

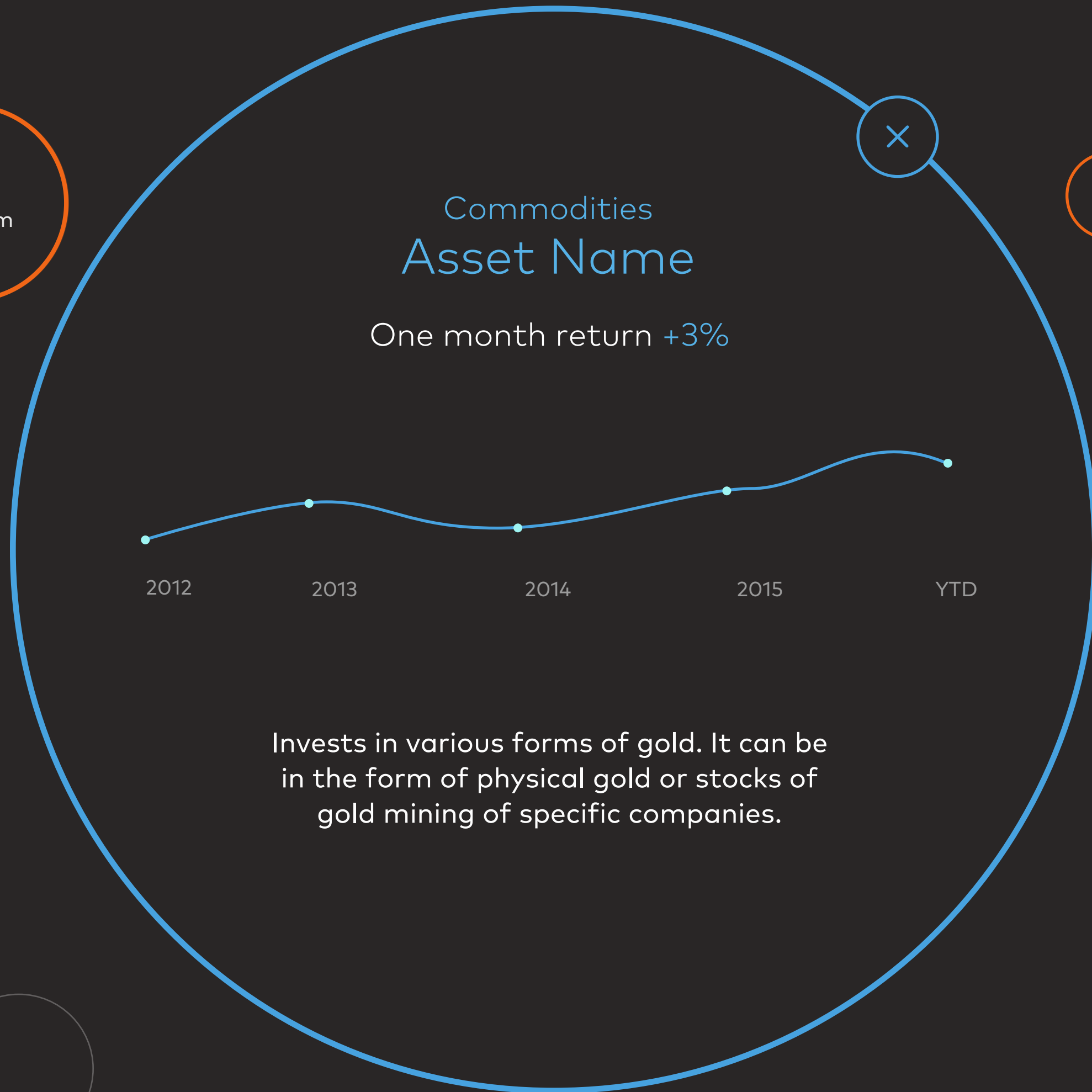
?

3
Medium
Risk

Tracker

Active

Active+



Invests in various forms of gold. It can be in the form of physical gold or stocks of gold mining of specific companies.

Invest Now

Save & Exit



Portfolio Geographical Allocation



£25,000
Lump sum

£1,000
Monthly

£100,000
Target

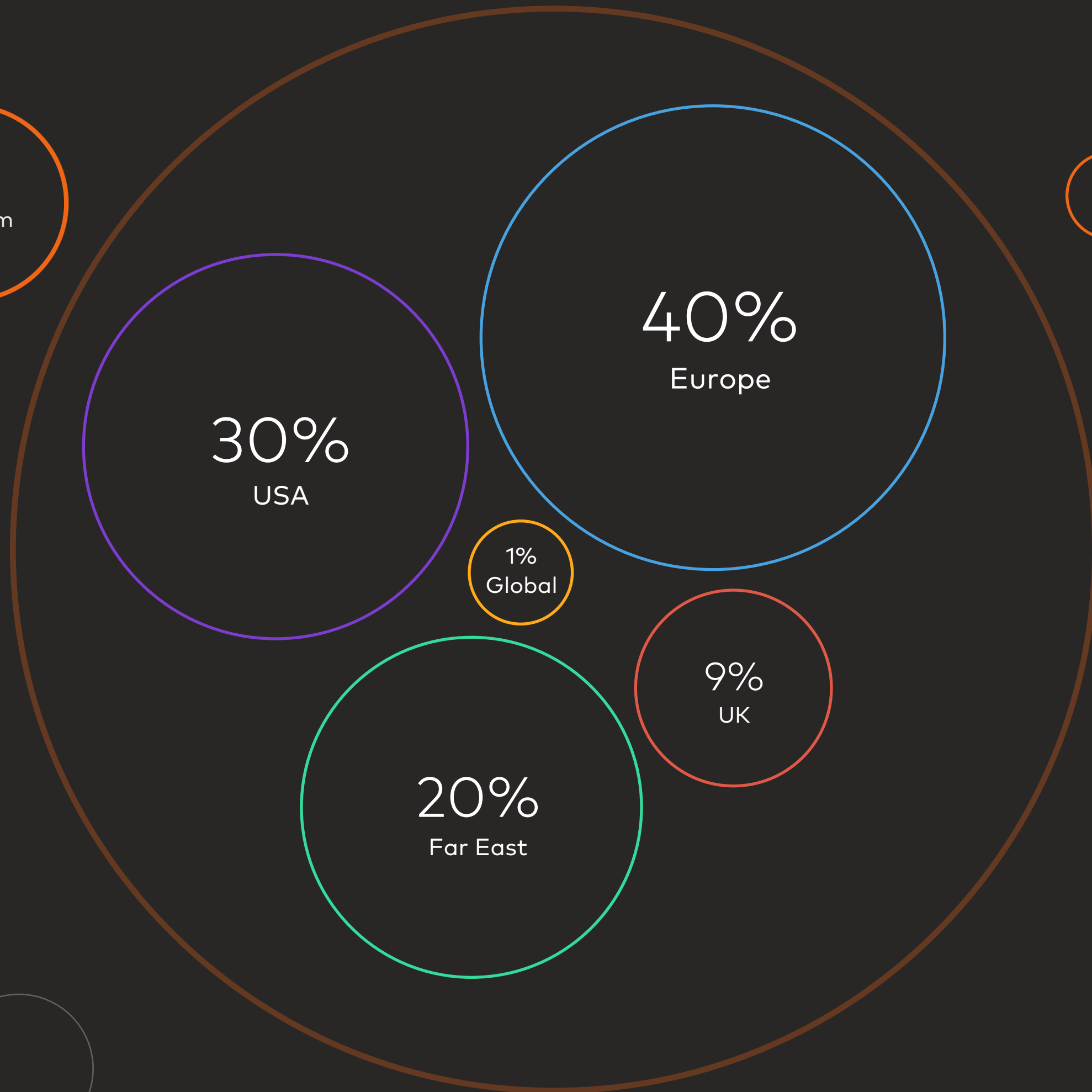
?

3
Medium
Risk

Tracker

Active

Active+



Invest Now

Save & Exit



Portfolio Funds Allocation



£25,000
Lump sum

3

Medium
Risk



Tracker

Active

Active+

£1,000
Monthly

£100,000
Target

?

Fund Name	Allocation	Type	Asset Class	Region
Vanguard FTSE 100 UCI...	15.0%	Active	Equities	European
iShares FTSE 250 UCITS...	14%	Passive	Commodities	Asia
db x-trackers EURO STO...	13%	Passive	Bonds	UK
Vanguard S&P 500 UCIT...	12%	Active	Cash	Global
PowerShares EQQQ Na...	11%	Active	Equities	European
iShares Euro High Yield Corporate Bond UCITS ETF		Passive	Commodities	Asia
		Passive	Bonds	UK
iShares Euro High Yield C...	8%	Active	Cash	Global
iShares \$ TIPS UCITS ETF	7%	Active	Equities	European
iShares Physical Gold ETC	6%	Passive	Commodities	Asia
Vanguard FTSE Developed...	5%	Passive	Bonds	UK
iShares UK Property UCITS...	4%	Active	Cash	Global



Invest Now

Save & Exit



Performance
Fund List

Fund Name	Ticker/ Sedol	Allocation	Type	YTD Return	3 Year Return	Asset Class	Region	Geographic Region	Base Currency	1 Year Volatility
Vanguard FTSE 100 UCITS ETF	ABCXYZ	15%	Active	+3.48%	+4.77%	Commodities	Developed	USA	USD	3%
iShares FTSE 250 UCITS ETF	BNLIS	13%	Passive	-0.95%	+15.44%	Bonds	Emerging	UK	GBP	1.5%
db x-trackers EURO STOXX 50 U...	OLERLOS	12%	Passive	+1.2%	+4.77%	Cash	Developed	Global	USD	2%
Vanguard S&P 500 UCITS ETF	KOALS	11%	Active	+8.66%	+15.44%	Other	Emerging	EU	GBP	4.3%
PowerShares EQQQ Nasdaq-100 ...	ABCXYZ	10%	Active	+3.48%	+4.77%	Commodities	Developed	USA	USD	3%
iShares UK Gilts 0-5yr UCITS ETF	BNLIS	9%	Passive	-0.95%	+15.44%	Bonds	Emerging	UK	GBP	1.5%
SPDR Barclays UK Gilt UCITS ETF	OLERLOS	8%	Passive	+1.2%	+4.77%	Cash	Developed	Global	USD	2%
iShares Euro High Yield Corporate ...	KOALS	7%	Active	+8.66%	+15.44%	Other	Emerging	EU	GBP	4.3%
iShares \$ TIPS UCITS ETF	ABCXYZ	6%	Active	+3.48%	+4.77%	Commodities	Developed	USA	USD	3%
iShares Physical Gold ETC	BNLIS	5%	Passive	-0.95%	+15.44%	Bonds	Emerging	UK	GBP	1.5%
Vanguard FTSE Developed Asia Pacifi...	OLERLOS	3%	Passive	+1.2%	+4.77%	Cash	Developed	Global	USD	2%
iShares UK Property UCITS ETF	KOALS	2%	Active	+8.66%	+15.44%	Other	Emerging	EU	GBP	4.3%



Overview
Active



3

Medium
Risk

Tracker



Active

Active+

£25,000
Lump sum

£1,000
Monthly

£100,000
Target

?

An Active portfolio offers more control over your investment by combining ETFs with top-performing managed funds hand-picked by our investment team.

Next

Invest Now

Save & Exit



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Active

Personalise your investment
with Active Plus

Take your portfolio's performance to the next level
with Active Plus and see the effects of adding and
removing up to 5 specialised 'themes'.

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me,

Next



Invest Now

Save & Exit



Portfolio Asset Allocation



£25,000
Lump sum

£1,000
Monthly

£100,000
Target

?

3
Medium
Risk

Tracker



Gold



Retail



Biotech



Property



Financial



Petrochemicals



Active



Active+

Add a Theme
To create your Active Plus portfolio please
add at least one specialised theme.



Invest Now

Save & Exit



Portfolio Asset Allocation



£25,000
Lump sum

£1,000
Monthly

£100,000
Target

?



Gold



Retail



Biotech



Property



Financial



Petrochemicals



Tracker

Active

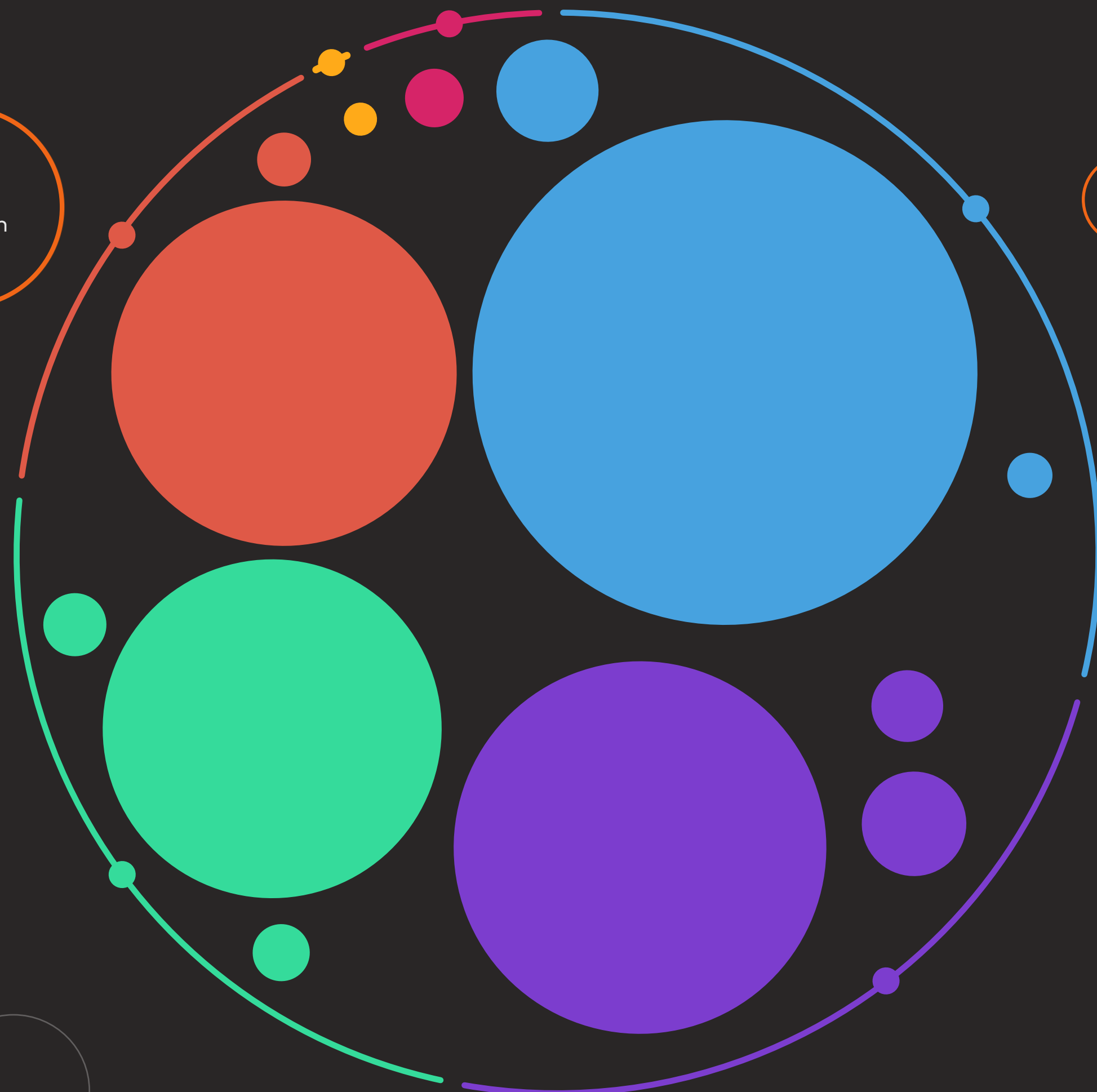


Active+



3

Medium
Risk



- 5% Themes
- 35% Commodities
- 30% Equities
- 20% Bonds
- 9% Cash
- 1% Other

Invest Now

Save & Exit



Portfolio Asset Allocation



£25,000
Lump sum

£1,000
Monthly

£100,000
Target

3
Medium
Risk

Tracker

- Gold +
- Retail +
- Biotech -
- Property +
- Financial +
- Petrochemicals +
- Active
- Active+



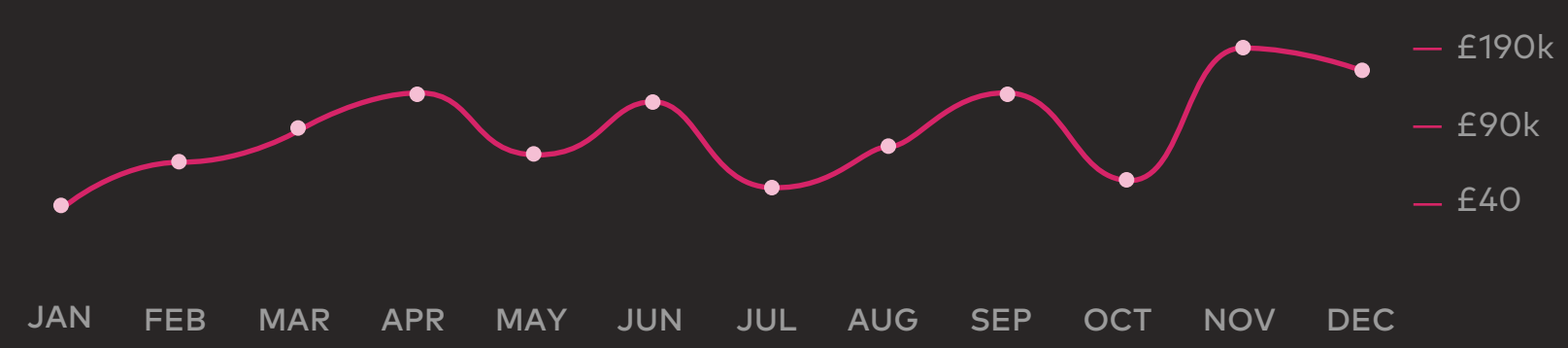
Biotech theme

Invests in Biotech companies and be amazed about how much your investment will grow.

One month return +3%

Past performance

5 years 1 year 6 months



Remove

Invest Now

Save & Exit



Portfolio Asset Allocation



£25,000
Lump sum

£1,000
Monthly

£100,000
Target

3

Medium
Risk

Tracker

Active

i

Active+

Gold



Retail



Biotech



Property



Financial



Petrochemicals



?

Petrochemicals theme

Invests in free and renewable energy.
Technology companies focused on.

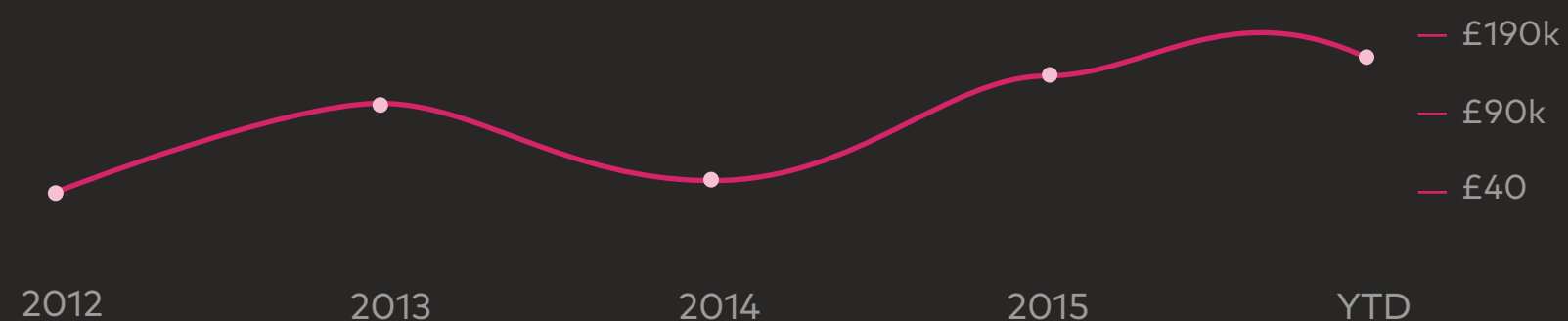
One month return **+8%**

Past performance

5 years

1 year

6 months



Add



Invest Now

Save & Exit



Portfolio Asset Allocation



£25,000
Lump sum

£1,000
Monthly

£100,000
Target

?

3
Medium Risk

Tracker

Active

Active+

Gold +

Retail +

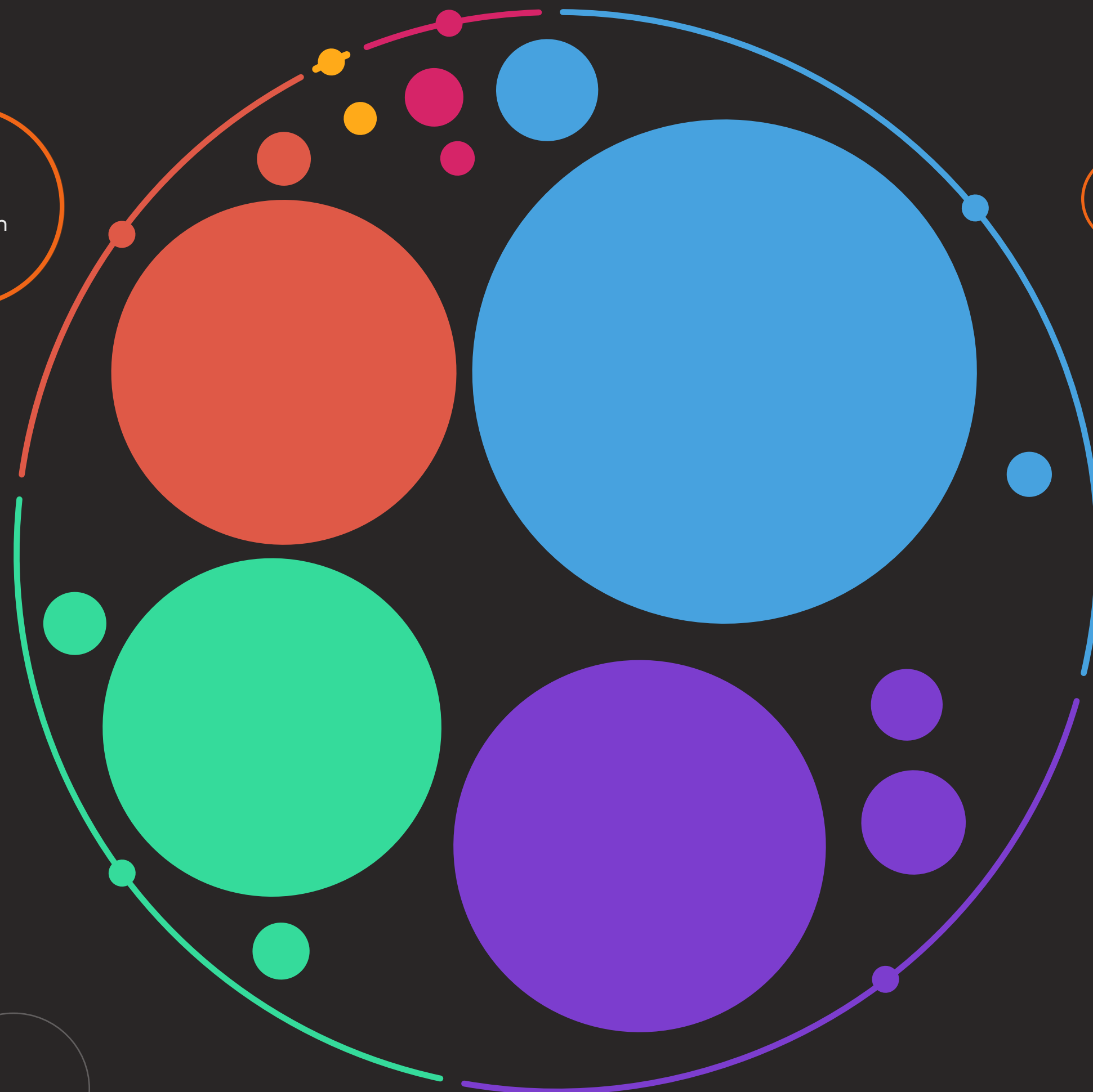
Biotech -

Property

Financial +

Petrochemicals -

Info icon



Bar chart icon

Network icon

Target icon

Prohibited icon

List icon

- 5% Themes
- 35% Commodities
- 30% Equities
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- 9% Cash
- 1% Other



Portfolio Asset Allocation



Are you sure?

An Active Plus portfolio must include at least one theme. Do you still want to remove the last one?

No

Yes

Tracker

Active

Active+

Gold

Retail

Biotech

Property

Financial

Petrochemicals

£25,000
Lump sum

£1,000
Monthly

£100,000
Target

?

Invest Now

Save & Exit



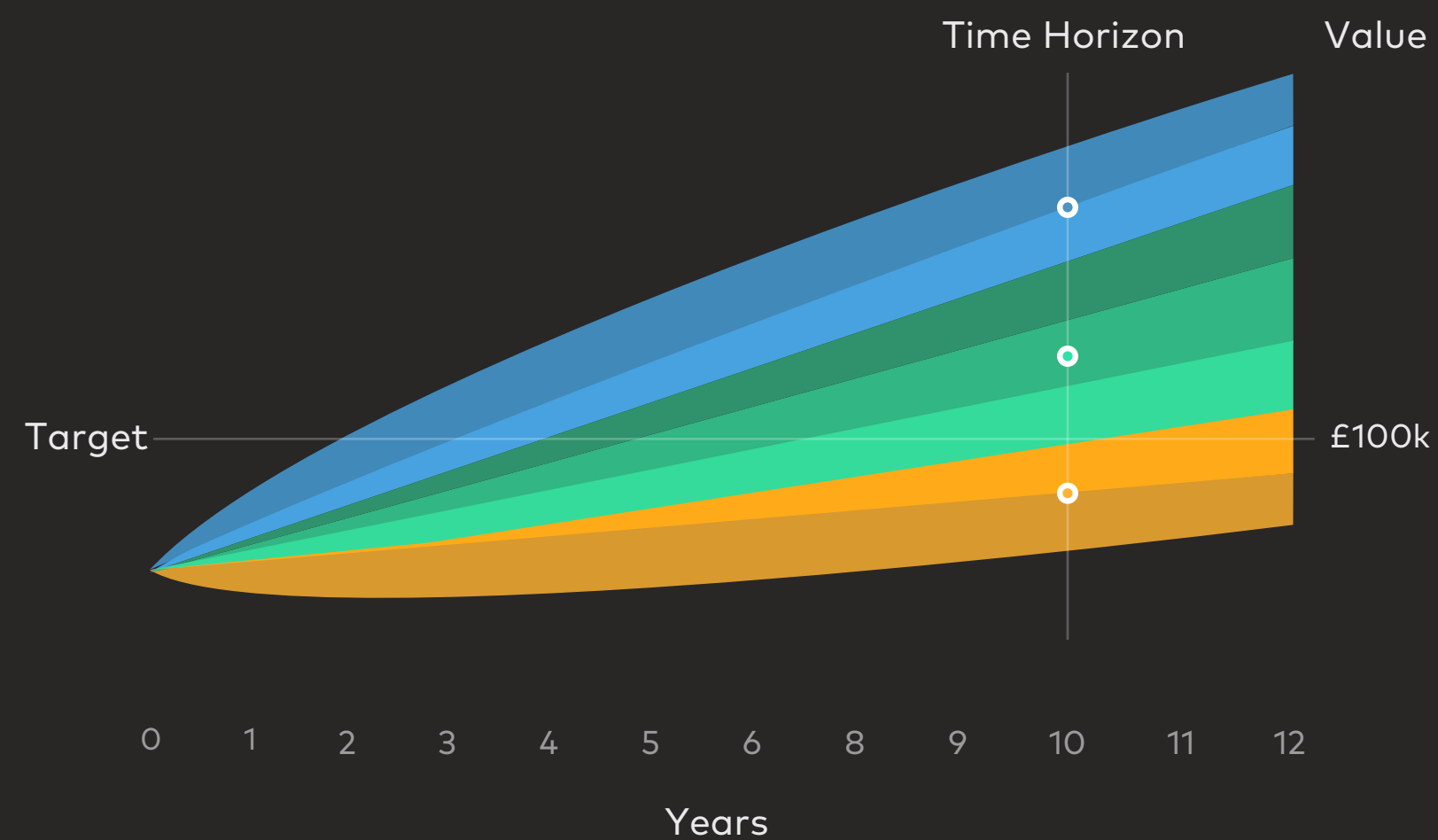
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In 10 investment years

Good
£168,000

Likely
£160,000

Poor
£155,000



£25,000
Lump sum

£1,000
Monthly

£100,000
Target

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Risk

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Active+

Gold

Retail

Biotech

Property

Financial

Petrochemicals

Invest Now

Save & Exit



Performance Future

Median return

Likely +12% £80,000 Good +6% £57,000 Poor -5% £45,000

Sorry!

Your current choice of themes means you can't add any more. Try experimenting with different combinations.

Ok

Value
£150,000
£100,000
£85,000

Time

Target

Years

£25,000
Lump sum

£1,000
Monthly

£100,000
Target

3

Medium
Risk

Tracker

Gold



Active

Retail



Biotech



Active+

Property



Financial



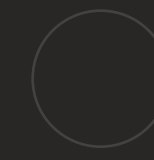
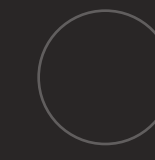
Petrochemicals



?

Invest Now

Save & Exit



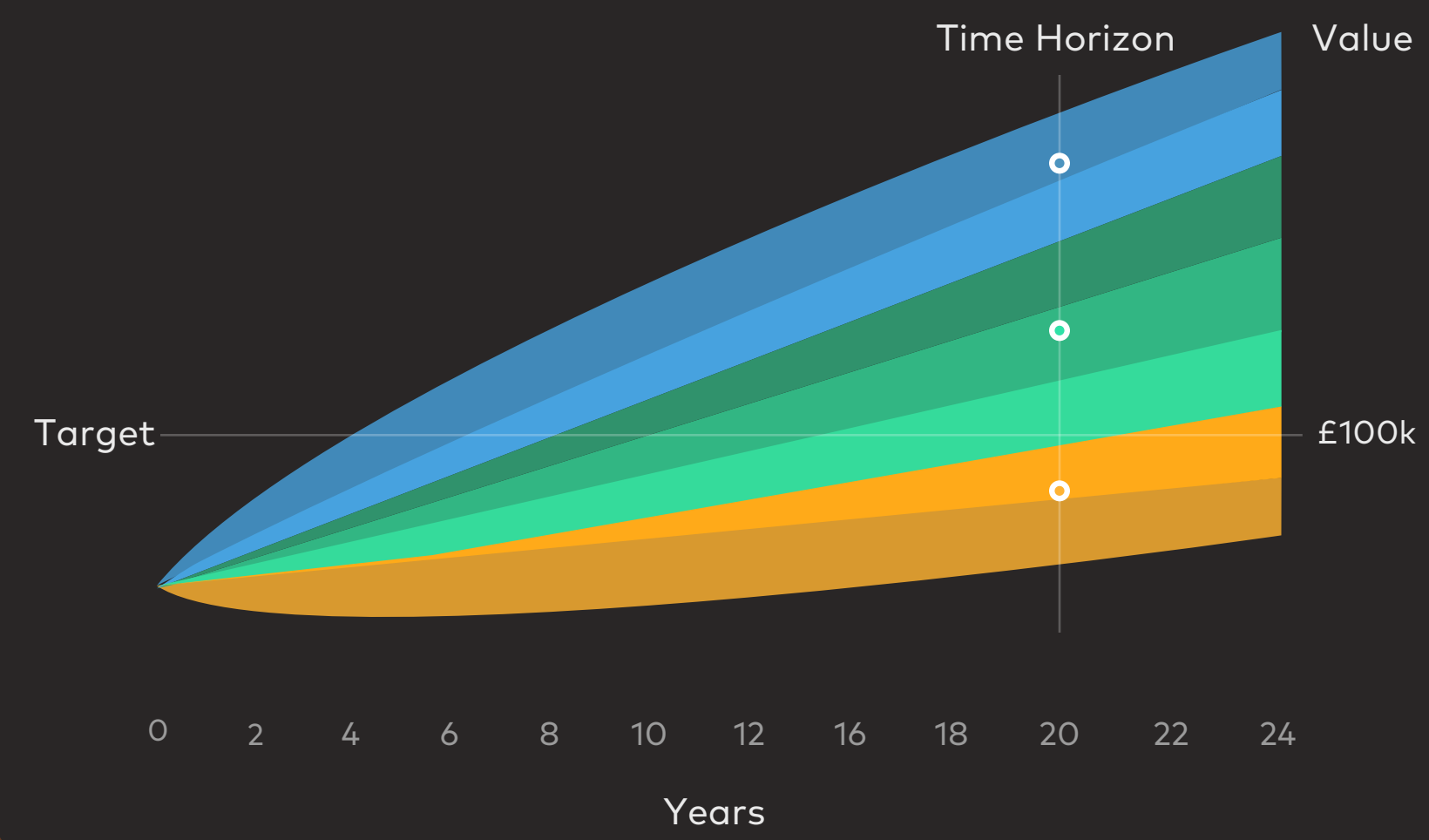
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Poor
£155,000



20

Invest Now

Save & Exit

£25,000
Lump sum

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Monthly

£100,000
Target

?

3

Medium
Risk

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Active+

Gold

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Property

Financial

Petrochemicals





Portfolio Asset Allocation

Your Asset Mix

Allocating your investments among different asset classes is a key strategy to help ... Asset allocation is the strategy of dividing your investment portfolio across various asset classes like stocks, bonds and money market.

Was this helpful?  

1

2

3

Gold

+

Retail

+

Biotech

-

Property

+

Financial

+

Petrochemicals

-

£25,000
Lump sum

£5,000
Monthly

£100,000
Target

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