



Overview
Tracker

Median return

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

Match the market
with Tracker

A Tracker portfolio invests your money in Exchange Traded Funds that match the performance of a selected 'index' such as the FTSE 100.

Next

3

Medium Risk

Tr

i



Ac

A+



£25,000
Lump sum

£1,000
Monthly

£100,000
Target

Invest Now

Save & Exit



£25,000
Lump sum

£1,000
Monthly

£100,000
Target

?

3
Medium
Risk

Tr

Ac

A⁺

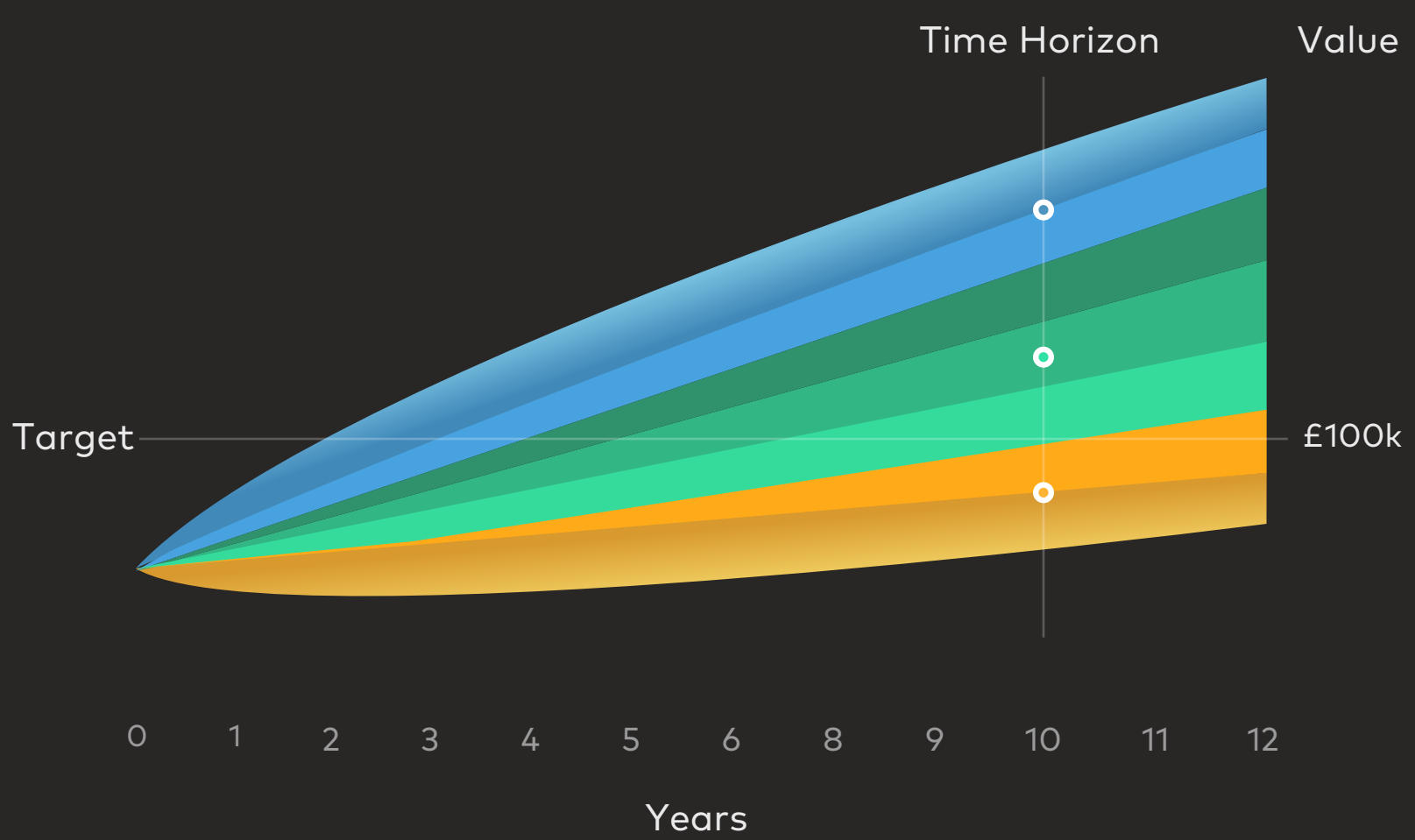
Performance
Future

In 10 investment years

Likely
£160,000

Good
£168,000

Poor
£155,000



10



Invest Now

Save & Exit



1. **Identify the main topic**
 2. **Summarize the key points**
 3. **Highlight the most important information**

3

Likely
£88,000

Good
£92,000

Poor
£84,000

Tr

Ac

A⁺

Target-

Time

Value

— £100k

Years

10

Invest Now

Save & Exit

?



£25,000
Lump sum

£1,000
Monthly

£100,000
Target

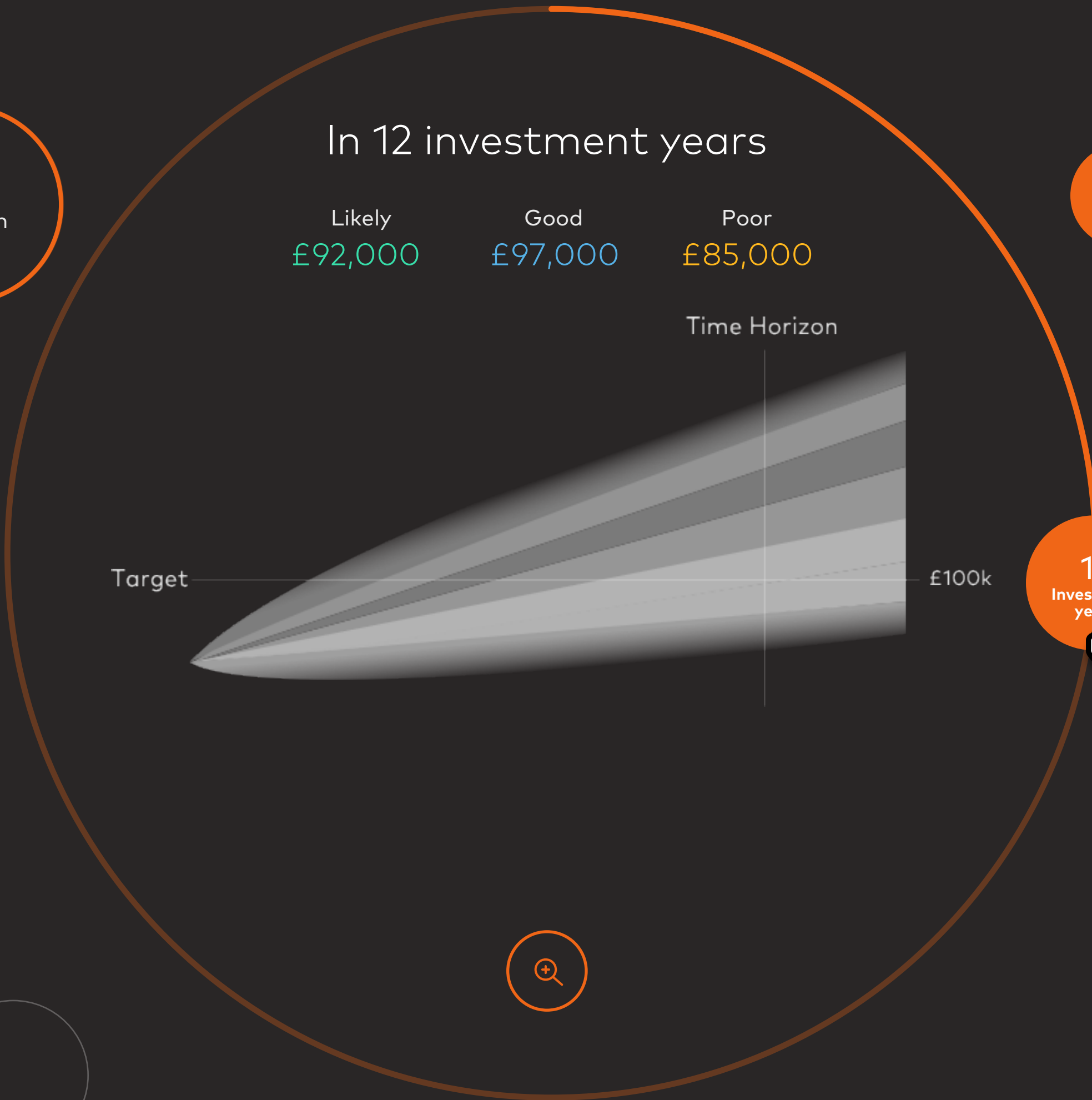
?

3
Medium
Risk

Tr

Ac

A⁺



Invest Now

Save & Exit



Performance
Future

In 10 investment years

Likely

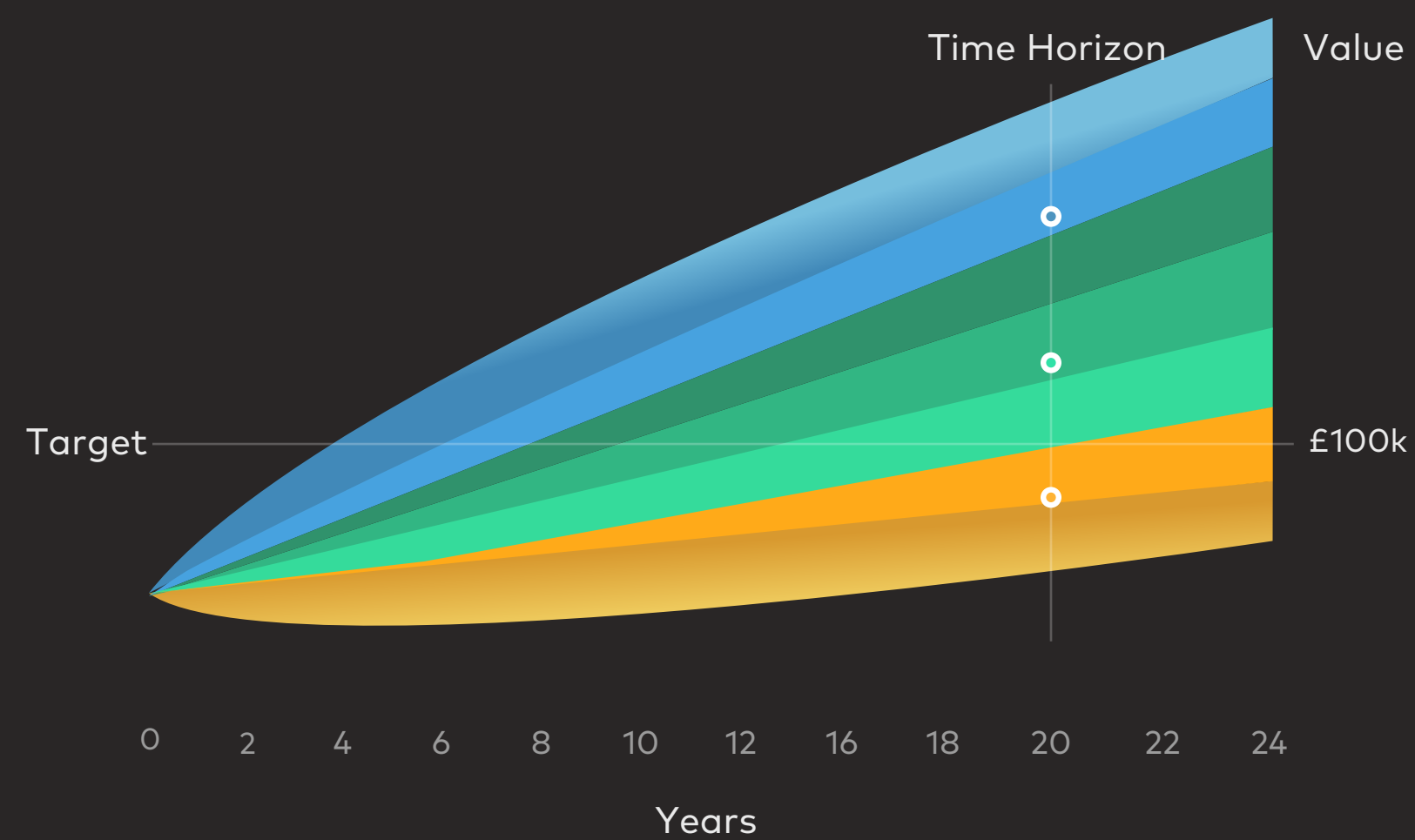
£160,000

Good

£168,000

Poor

£155,000



3

Medium
Risk

Tr

Ac

A⁺

£25,000
Lump sum

£1,000
Monthly

£100,000
Target

?

20

Invest Now

Save & Exit



Performance
Future

Likely
£91,000

Good
£65,000

Poor
£45,000

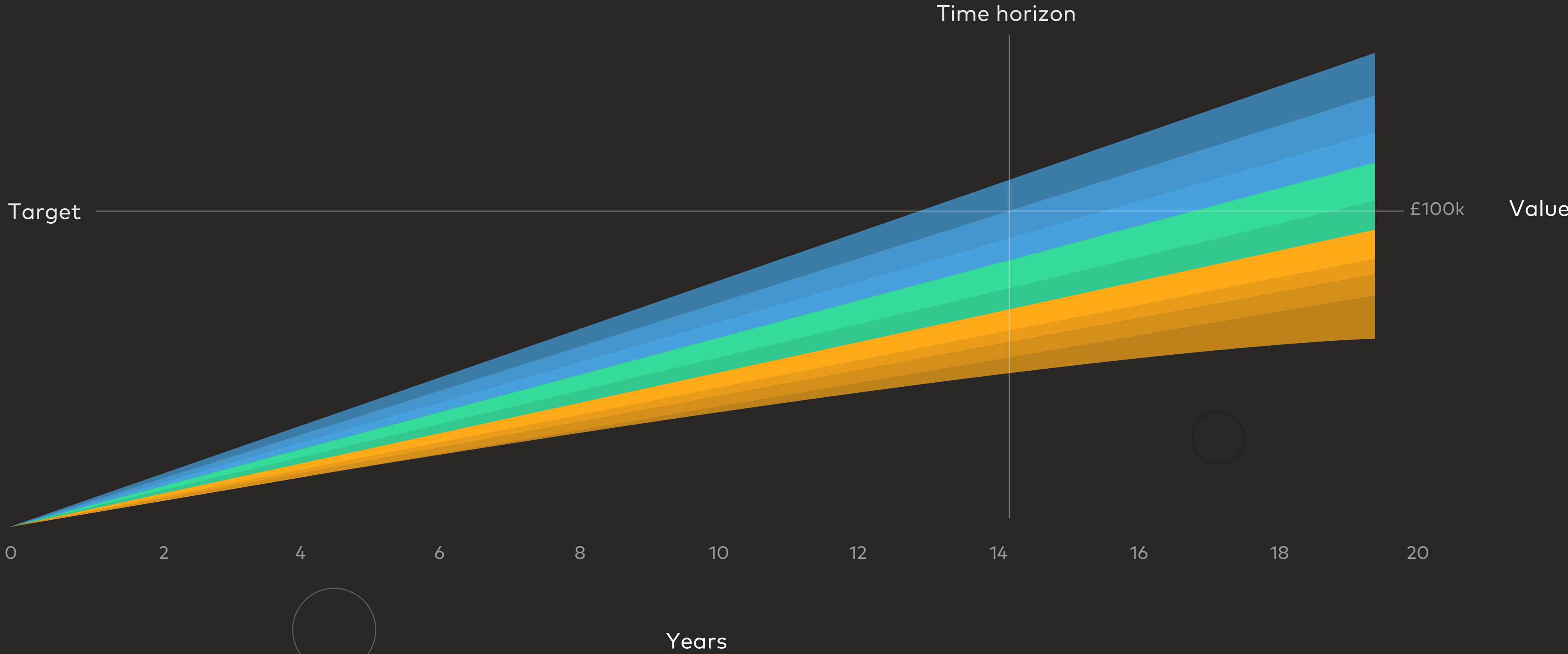
£25,000
Lump sum

£1,000
Monthly

£100,000
Target

10
Years

?





£25,000
Lump sum

£1,000
Monthly

£100,000
Target

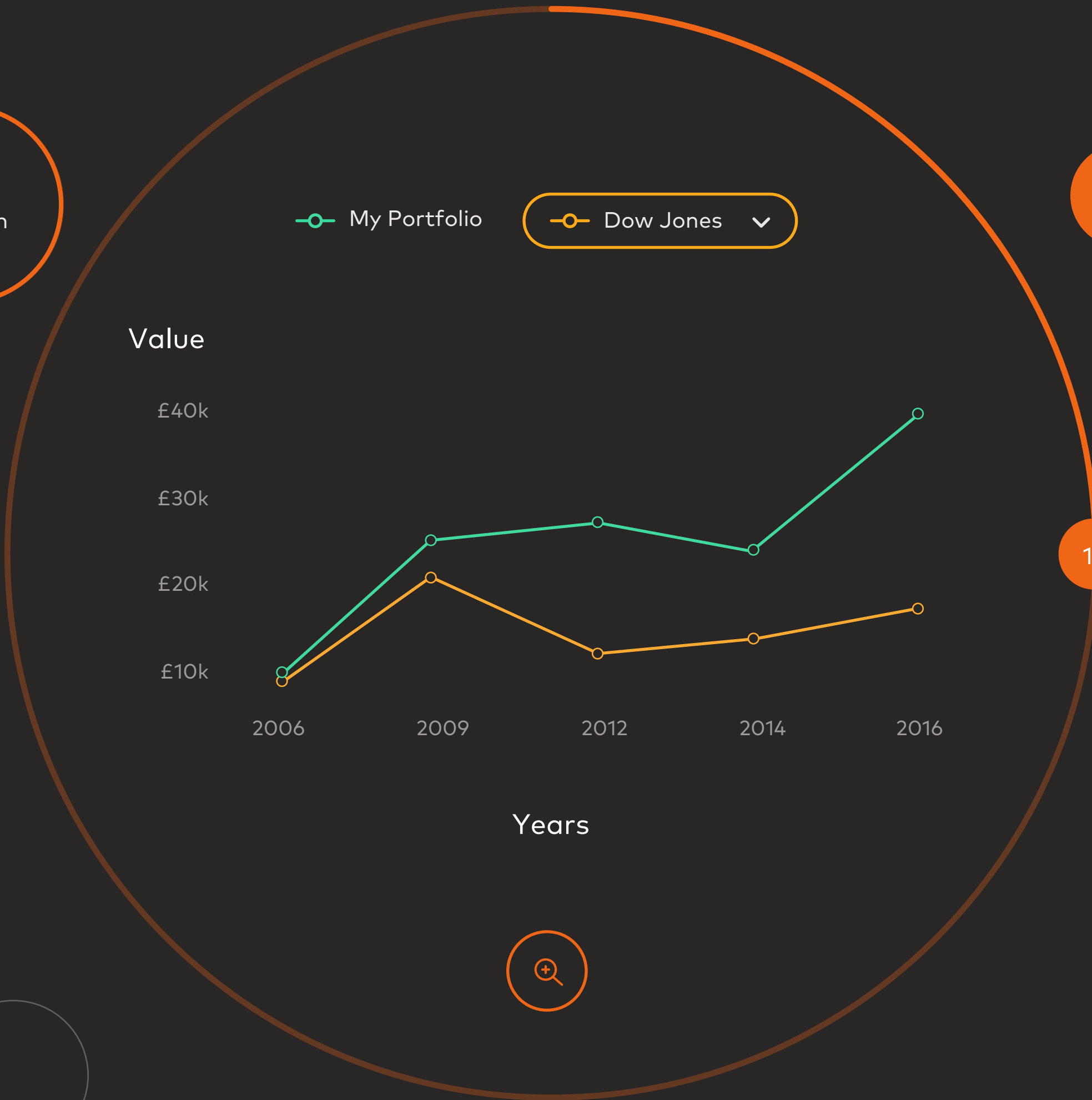
3
Medium
Risk

Tr

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10



Invest Now

Save & Exit

 Dow Jones

▼

Lump sum

Monthly

Target

Years

?



2016



Portfolio Asset Allocation

£25,000
Lump sum

£1,000
Monthly

£100,000
Target

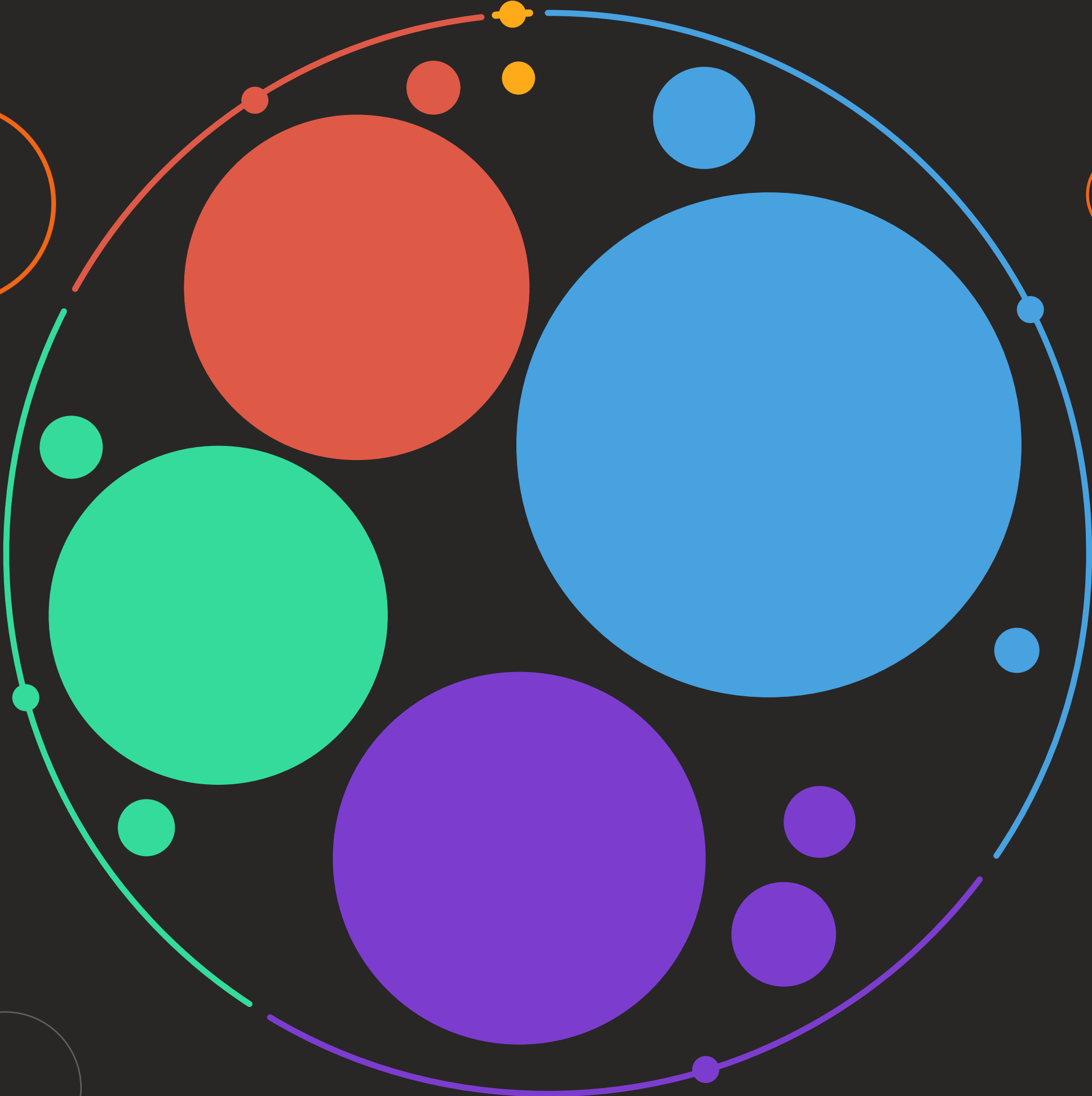
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3
Medium
Risk

Tr

Ac

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- 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

Tr

Ac

A⁺

1%

● 40% Commodities

● 30% Equities

● 20% Bonds

● 9% Cash

1% Other

Invest Now

Save & Exit



£25,000
Lump sum

£1,000
Monthly

£100,000
Target

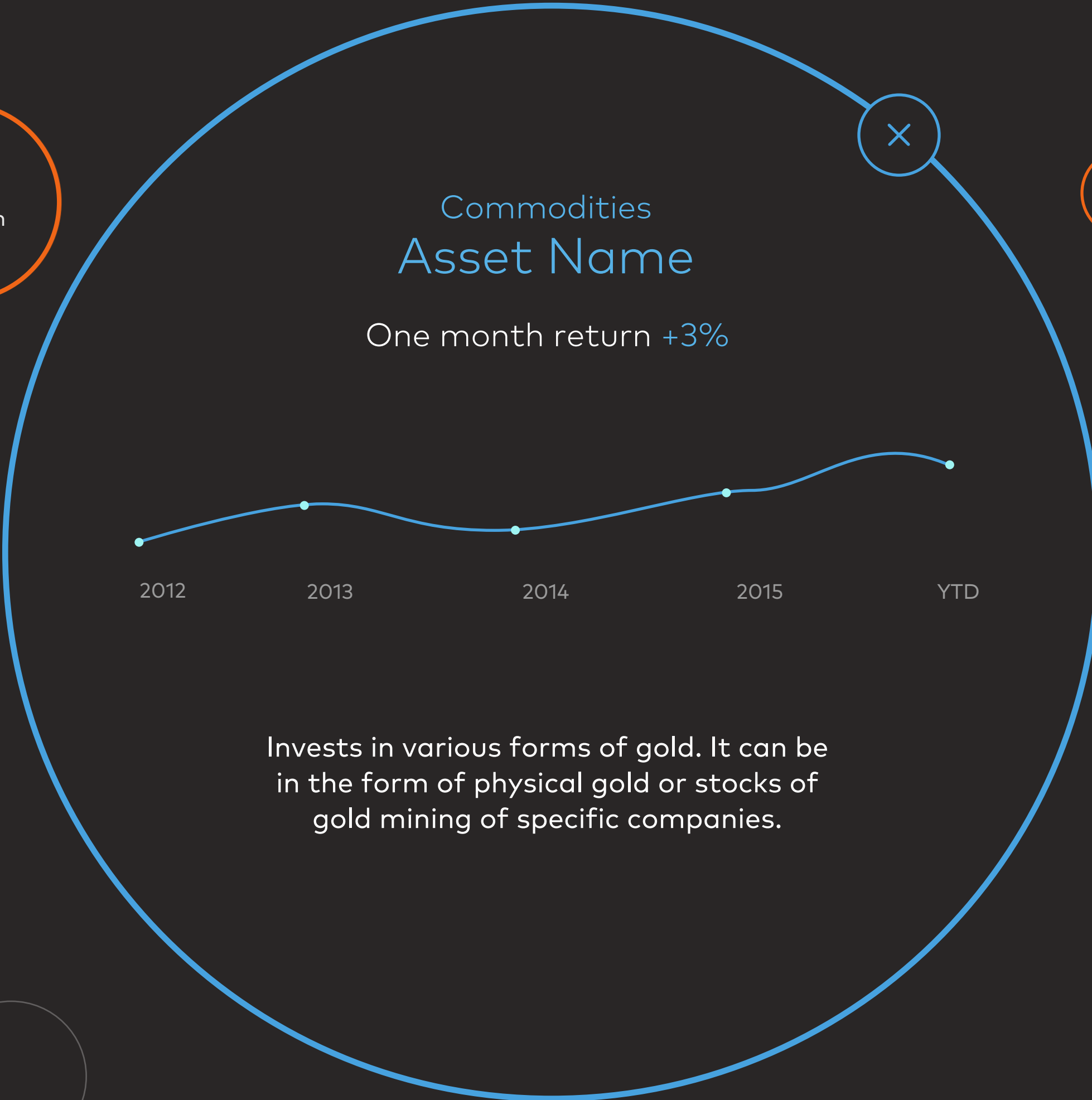
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3
Medium
Risk

Tr

Ac

A⁺



Invest Now

Save & Exit



Portfolio
Geographical Allocation

£25,000
Lump sum

£1,000
Monthly

£100,000
Target

?

3
Medium
Risk

Tr

Ac

A⁺

30%
USA

1%
Global

20%
Far East

40%
Europe

9%
UK



Invest Now

Save & Exit



Portfolio

Funds Allocation



£25,000

Lump sum

£1,000

Monthly

£100,000

Target



3

Medium Risk

Tr

i

Ac

A⁺

Fund Name	Allocation	Type	Asset Class	Region
Vanguard FTSE 100 UCITS...	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 \$ T 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



Overview
Active



£25,000
Lump sum

£1,000
Monthly

£100,000
Target



3
Medium
Risk

Tr



Ac

A⁺

Active adds hand-picked funds

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



Overview

Active Plus



£25,000
Lump sum

£1,000
Monthly

£100,000
Target

3
Medium
Risk

Tr

Ac

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i

Gold

Retail

Biotech

Property

Financial

Petrochemicals

+

+

+

+

+

+

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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'.



Next



Invest Now

Save & Exit



Portfolio
Asset Allocation

£25,000
Lump sum

£1,000
Monthly

£100,000
Target

3
Medium
Risk

Tr

Ac



A⁺

- Gold
- Retail
- Biotech
- Property
- Financial
- Petrochemicals



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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

?

3
Medium
Risk

Tr

Ac



A⁺

- Gold

+
- Retail

+
- Biotech

-
- Property

+
- Financial

+
- Petrochemicals

+



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

Invest Now

Save & Exit



£25,000
Lump sum

£1,000
Monthly

£100,000
Target

?

3
Medium Risk

Tr

Ac

A⁺

Gold +

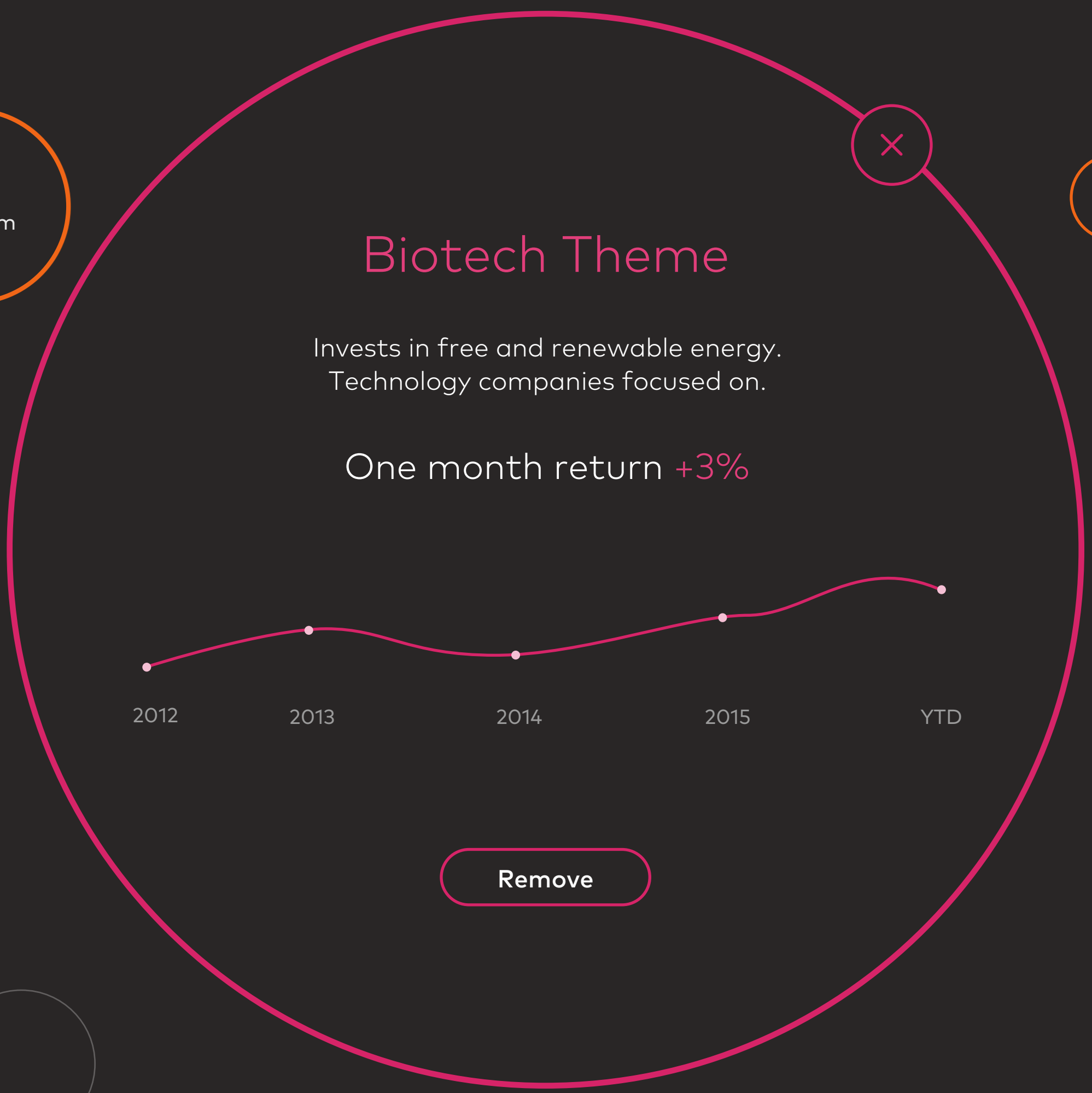
Retail +

Biotech -

Property +

Financial +

Petrochemicals +



Invest Now

Save & Exit



£25,000
Lump sum

£1,000
Monthly

£100,000
Target

?

3
Medium
Risk

Tr

Ac



A⁺

Gold



Retail



Biotech



Property



Financial



Petrochemicals



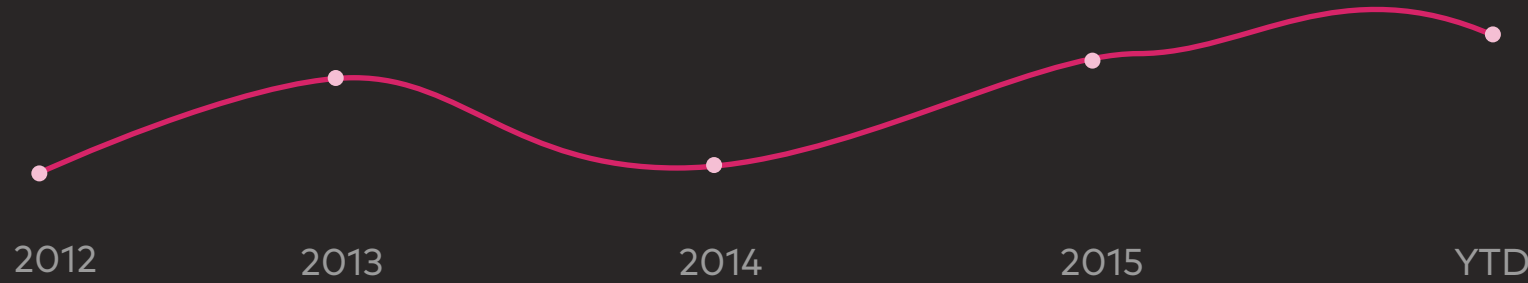
Portfolio Asset Allocation



Petrochemicals theme

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

One month return +8%



Add



Invest Now

Save & Exit



Portfolio
Asset Allocation

£25,000
Lump sum

£1,000
Monthly

£100,000
Target

?

3
Medium
Risk

Tr

Ac



A⁺

- Gold

+
- Retail

+
- Biotech

-
- Property

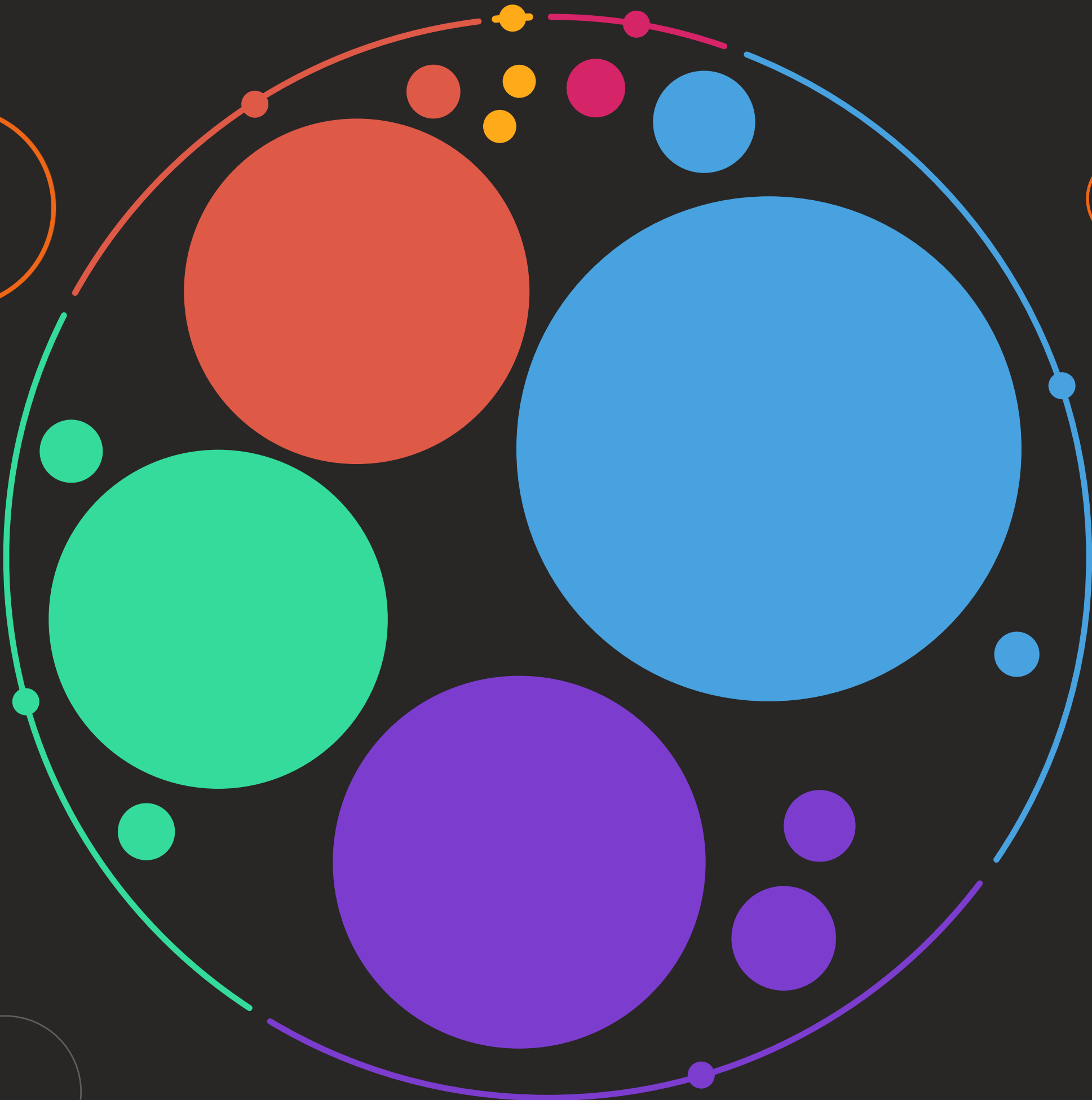
+
- Financial

+
- Petrochemicals

-



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



Tr

Gold



Ac

Retail

Biotech



A⁺

Property



Financial

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Petrochemicals

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Are you sure?

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

No

Yes

Invest Now

Save & Exit



£25,000
Lump sum

£1,000
Monthly

£100,000
Target

3
Medium Risk

Tr

Ac



A⁺

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

?

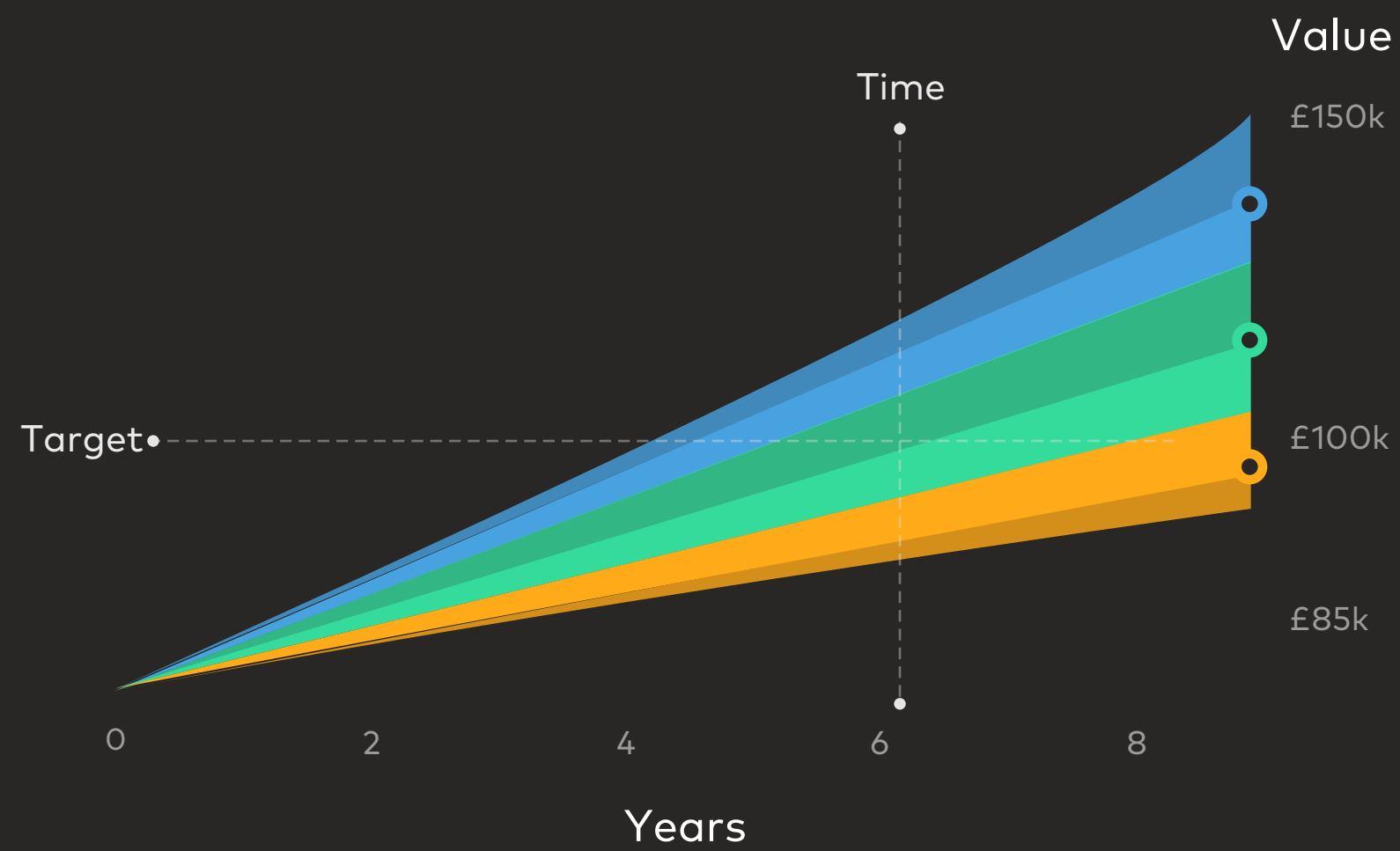
Performance Future

Median return

Likely +12%
£80,000

Good +6%
£57,000

Poor -5%
£45,000



Invest Now

Save & Exit



£25,000
Lump sum

3
Medium Risk

£1,000
Monthly

£100,000
Target

Tr

Ac

A⁺

Gold

Retail

Biotech

Property

Financial

Petrochemicals

+

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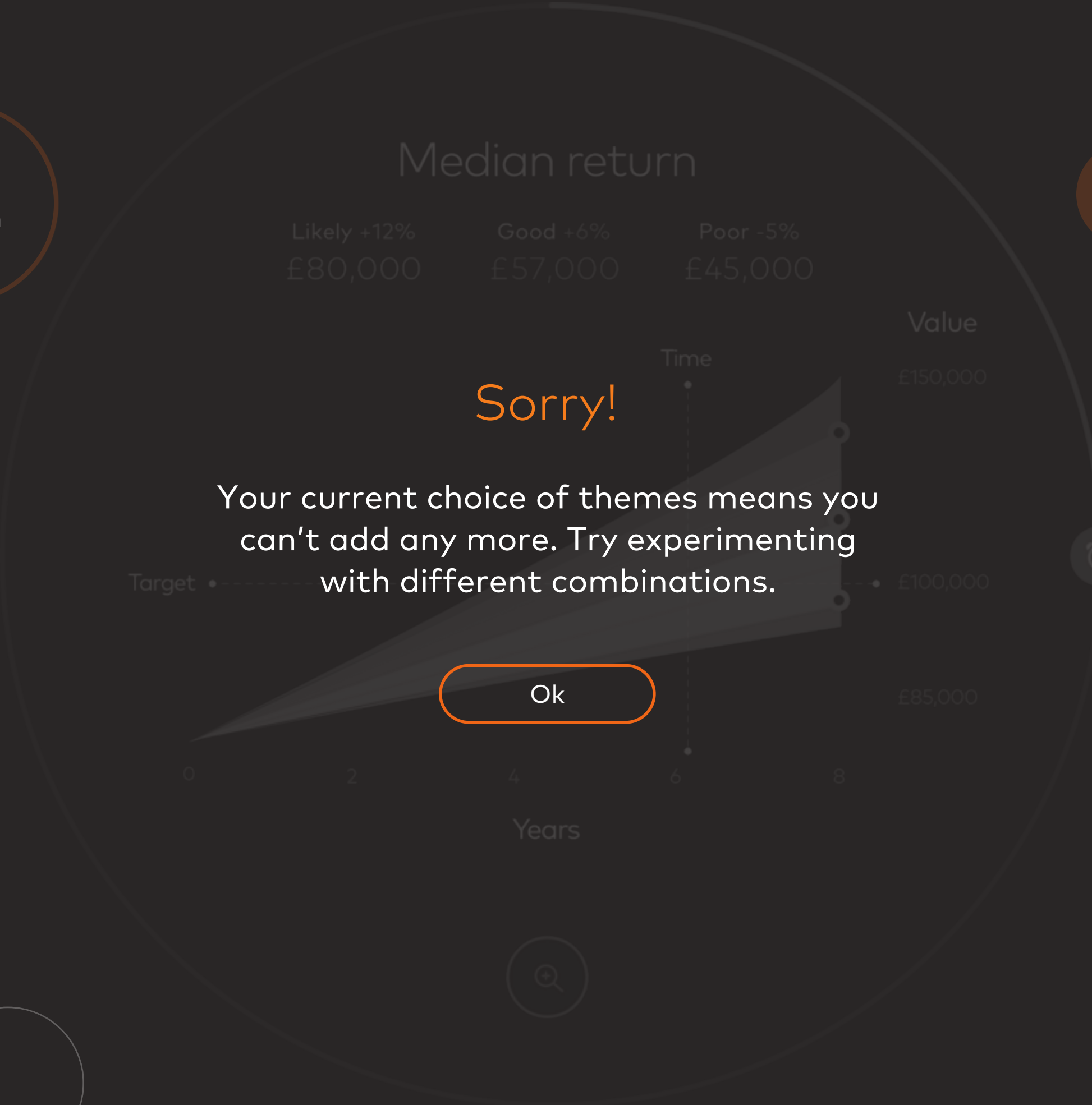
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-

-

-

-



Invest Now

Save & Exit



Performance Future

Median return

Likely +18%
£93,000

Good +10%
£67,000

Poor 0%
£55,000

Value

£150k

£100k

£85k

Time

Target•

Years

3

Medium
Risk

Tr

Ac

A⁺

Gold

Retail 

Biotech

Property 

Financial

Petrochemicals

£25,000
Lump sum

£1,000
Monthly

£100,000
Target

?

Invest Now

Save & Exit



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?



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

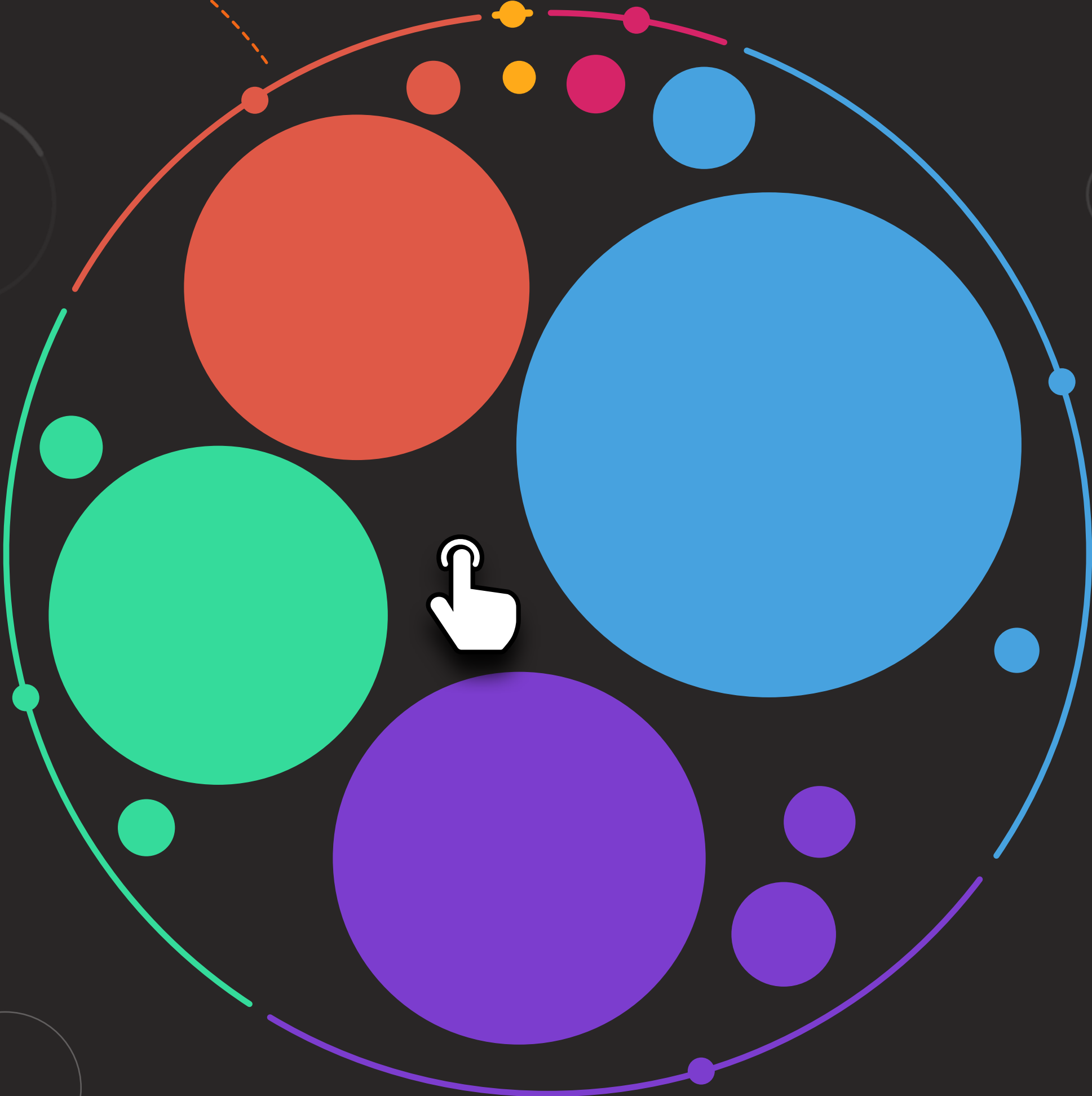
3 Risk

1

2

3

Portfolio Asset Allocation



- 5% Themes
- 35% Commodities
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