

ACTIVE MODEL PORTFOLIO SERVICE - ASSET ALLOCATION

31 MARCH 2020



Portfolio Type	1	2	3	4	5	6	7*	8*	9	10	Income 1	Income 2
Cash / Money Markets	9	7	4.5	2	2	2	2	2	2	2	3	2
UK Fixed Interest	43.5	37	29	22	17.5	13.5	11	7.5	7.5	7.5	34.5	24
International Fixed Interest	7.5	6	6	5	4	3	2	2	1.5	1	17	15
Equity	16.5	27.5	40.5	51.5	57	64.5	72.25	79.5	81.5	84	45.5	59
UK Equity	6.5	12.5	20.5	25.5	27	30	32.5	35	35	36	23	30
International Equity	10	15	20	26	30	34.5	39.8	44.5	46.5	48	22.5	29
Property	5	5	5	5	5	5	4.25	3.5	3	2.5	0	0
Absolute Return	18.5	17.5	15	14.5	14.5	12	8.5	5.5	4.5	3	0	0

Source: Brown Shipley

This document is for Professional Advisers only and facilitates the selection of the appropriate portfolio. The asset allocations are indicative only, offering a guide to each portfolio. They may not be exactly replicated and are liable to change without notice. Brown Shipley funds may be used in your model portfolios, however, these will only be used if they are consistently above average performance in their respective sectors.

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The value of investments and any income from them may fluctuate and are not guaranteed. Investors may not get back the amount originally invested. Past performance is not a reliable indicator of future results. Currency fluctuations may cause the value of underlying investments to go up or down. Changes to interest rates can affect the value of high yielding bonds. The yield generated is subject to fluctuation and is not guaranteed. Investment in emerging markets can be more volatile than other overseas markets. * As at 31 December 2017 the IA sectors changed for Model Portfolios 7 and 8 from IA Flexible Investment sector to the IA Mixed Investment 40-85% Shares sector.

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