

Future Focused Balanced

Fund changes - Q1 2026

Original Allocation	New Allocation	Fund name
7	9	AllianceBernstein - Sustainable US Equity
6	6	CT - Responsible Global Equity
5	5	EdenTree - European Equity
10	10	iShares - ESG Screened Overseas Corporate Bond Index
7	7	iShares - UK Equity ESG Screened and Optimised Index
6	6	Janus Henderson - Global Sustainable Equity
5	5	JPM - Global Macro ESG
6	6	Jupiter - Ecology
4	4	Liontrust - Sustainable Future Corporate Bond
6	6	Liontrust - Sustainable Future UK Growth
8	8	Rathbone - Ethical Bond
6	4	Royal London - Short Duration Credit
3	3	Royal London - Short Term Fixed Income
7	7	Royal London - Sustainable Leaders
9	9	Schroder - Global Sustainable Value Equity
5	0	Stewart Investors - Asia Pacific All Cap
	5	Royal London Emerging Markets Equity Tilt

BUY

SELL

INCREASE

DECREASE

Accepting these fund changes will result in portfolios being updated to reflect the selection above. Where no changes are recommended, a rebalance will occur to restore the correct weightings. In the case of fund suspensions, a cash alternative will be used for new investments and regular premiums and also where it is necessary to bring a portfolio up to 100%.

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