

Future Focused Balanced

Fund changes - Q3 2026

Original Allocation	New Allocation	Fund name
4	4	AllianceBernstein - Sustainable US Equity
5	5	BNY Mellon - Real Return (Responsible)
5	4	CT - Responsible Global Equity
5	5	EdenTree - European Equity
10	10	iShares - ESG Screened Overseas Corporate Bond Index
11	11	iShares - UK Equity ESG Screened and Optimised Index
10	12	iShares - US Equity ESG Screened and Optimised Index
5	5	Janus Henderson - Global Sustainable Equity
5	4	Jupiter - Ecology
4	4	Liontrust - Sustainable Future Corporate Bond
3	3	Liontrust - Sustainable Future UK Growth
8	8	Rathbone - Ethical Bond
6	6	Royal London - Emerging Markets Equity Tilt
4	4	Royal London - Short Duration Credit
3	3	Royal London - Short Term Fixed Income
5	5	Royal London - Sustainable Leaders
7	7	Schroder - Global Sustainable Value Equity

BUY	SELL	INCREASE	DECREASE
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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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