IMS Capital

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Cautious portfolio

Quilter CB1/2 fund changes - Q4 2026

Original Allocation (%)	***New Allocation (%)***	Fund name
2	***2***	abrdn - Global Inflation Linked Bond
6	***6***	abrdn - Sterling Money Market
3	***3***	Artemis - High Income
4	***4***	AXA - Sterling Credit Short Duration Bond
3	***3***	Blackrock - UK Absolute Alpha
5	***6***	Fidelity - Emerging Markets
3	***2***	Fidelity - Index Japan
5	***5***	First Sentier - Global Listed Infrastructure
10	***10***	HSBC - American Index
8	***8***	HSBC - FTSE 100 Index
5	***5***	HSBC European Index
2	***2***	Invesco - Global Smaller Companies
5	***5***	iShares - ESG Overseas Corporate Bond Index
2	***2***	iShares - Pacific ex Japan Index
3	***3***	Janus Henderson - Absolute Return
3	***3***	Jupiter - Strategic Bond
5	***5***	L&G - All Stocks Gilt Index
2	***2***	M&G - Emerging Markets Bond
6	***6***	M&G - Global Dividend
2	***2***	M&G - Global Macro Bond
3	***3***	Rathbone - Income
6	***6***	Royal London - Corporate Bond
3	***3***	Schroder - Recovery
4	***4***	Schroder - US Smaller Companies

BUY	SELL	INCREASE	REDUCE

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