IMS Capital

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Future Focused Balanced portfolio

Quilter CB1/2 fund changes - Q4 2026

Original Allocation (%)	***New Allocation (%)***	Fund name
9	***9***	abrdn - Global Sustainable and Responsible Investment Equity
5	***5***	abrdn - Sterling Money Market
3	***3***	Blackrock - UK Absolute Alpha
9	***9***	CT - Responsible Global Equity
3	***3***	CT - Responsible UK Equity
5	***5***	EdenTree - European Equity
4	***4***	EdenTree - Sterling Bond
6	***6***	Fidelity Responsible Emerging Markets Equity
10	***10***	iShares - ESG Screened Overseas Corporate Bond Index
12	***12***	iShares - UK Equity ESG Screened and Optimised Index
9	***9***	Janus Henderson - Global Sustainable Equity
9	***9***	Jupiter - Ecology
4	***4***	M&G Short Dated Corporate Bond
8	***8***	Rathbone - Ethical Bond
4	***4***	Royal London - Sustainable Leaders

BUY	SELL	INCREASE	REDUCE

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