IMS Capital

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Future Focused Balanced portfolio

Fund changes - Q4 2026

Original Allocation (%)	***New Allocation (%)***	Fund name
4	***4***	AllianceBernstein - Sustainable US Equity
5	***5***	BNY Mellon - Real Return (Responsible)
4	***4***	CT - Responsible Global Equity
5	***5***	EdenTree - European Equity
10	***0***	iShares - ESG Screened Overseas Corporate Bond Index
11	***11***	iShares - UK Equity ESG Screened and Optimised Index
12	***12***	iShares - US Equity ESG Screened and Optimised Index
5	***5***	Janus Henderson - Global Sustainable Equity
4	***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
	10	abrdn - Global Sustainable Corporate Bond Screened Tracker

BUY | SELL | INCREASE | REDUCE

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