IMS Capital
Future Focused Cautious portfolio

Fund changes - Q4 2026

Original Allocation (%)	***New Allocation (%)***	Fund name
6	***6***	Aegon - Ethical Corporate Bond
4	***4***	AllianceBernstein - Sustainable US Equity
6	***6***	BNY Mellon - Real Return (Responsible)
4	***4***	EdenTree - European Equity
6	***6***	EdenTree - Sterling Bond
10	***0***	iShares - ESG Screened Overseas Corporate Bond Index
8	***8***	iShares - UK Equity ESG Screened and Optimised Index
8	***8***	iShares - US Equity ESG Screened and Optimised Index
5.5	***5.5***	Janus Henderson - Global Sustainable Equity
5.5	***5.5***	Jupiter - Ecology
2	***2***	Liontrust - Sustainable Future UK Growth
8	***8***	Rathbone - Ethical Bond
4	***4***	Royal London - Emerging Markets Equity Tilt
7	***7***	Royal London - Short Duration Credit
6	***6***	Royal London - Short Term Fixed Income
4	***4***	Royal London - Sustainable Leaders
6	***6***	Schroder - Global Sustainable Value Equity
	10	abrdn - Global Sustainable Corporate Bond Screened Tracker

BUY	SELL	INCREASE	REDUCE

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