IMS Capital
Future Focused Growth portfolio

Fund changes - Q4 2026

Original Allocation (%)	***New Allocation (%)***	Fund name
5	***5***	AllianceBernstein - Sustainable US Equity
3	***3***	BNY Mellon - Real Return (Responsible)
5.5	***5.5***	CT - Responsible Global Equity
7	***7***	EdenTree - European Equity
7	***0***	iShares - ESG Screened Overseas Corporate Bond Index
12	***12***	iShares - UK Equity ESG Screened and Optimised Index
14	***14***	iShares - US Equity ESG Screened and Optimised Index
5.5	***5.5***	Janus Henderson - Global Sustainable Equity
5.5	***5.5***	Jupiter - Ecology
3	***3***	Liontrust - Sustainable Future UK Growth
5	***5***	Rathbone - Ethical Bond
8	***8***	Royal London - Emerging Markets Equity Tilt
3	***3***	Royal London - Short Duration Credit
5	***5***	Royal London - Sustainable Leaders
8.5	***8.5***	Schroder - Global Sustainable Value Equity
3	***3***	Stewart Investors - Asia Pacific All Cap
	7	abrdn - Global Sustainable Corporate Bond Screened Tracker

BUY | SELL | INCREASE | REDUCE

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For further information please contact your financial adviser.

Tel: +44 2392 239800
Fax: +44 2392 263432
Email: info@imscapital.co.uk

5 Lancer House
Hussar Court
Westside View
Waterlooville
Hampshire
PO7 7SE