IMS Capital

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Growth portfolio
Fund changes - Q4 2026

Original Allocation (%)	***New Allocation (%)***	Fund name
4	***4***	Aviva Inv - Multi Strategy Target Return
2	***2***	Axa Framlington - Health
5	***6***	Fidelity - Emerging Markets
4	***3***	Fidelity - Index Japan
4	***4***	First Sentier - Global Listed Infrastructure
11	***12***	HSBC - American Index
4	***4***	HSBC - European Index
7	***7***	HSBC - FTSE 100 Index
5	***5***	HSBC - S&P 500 Equal Weight Equity Index
3	***3***	iShares - ESG Screened Overseas Corporate Bond Index
4	***4***	iShares - Pacific ex Japan Index
2	***2***	JPM - Natural Resources
3	***3***	Jupiter - India
2	***2***	L&G - All Stocks Gilt Index
3	***3***	L&G - Global Technology Index Trust
4	***4***	L&G - UK Mid Cap Index
4	***3***	Liontrust - European Dynamic
3	***3***	Liontrust - Special Situations
2	***2***	M&G - Emerging Markets Bond
4	***4***	M&G - Global Dividend
3	***3***	Montanaro - Global Select
3	***3***	Rathbone - Income
4	***4***	Royal London - Corporate Bond
2	***2***	Ruffer - Diversified Return
3	***3***	Schroder - Recovery
5	***5***	Schroder - US Smaller Companies

BUY	SELL	INCREASE	REDUCE

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