

## OBJECTIVE

This model comprises a wide range of diversified active investment vehicles including unit trusts and mutual funds, whose managers aim to outperform their respective markets. Asset classes you could find in this portfolio are equities, government bonds, corporate bonds, alternatives, commodities and cash. Absolute return, multi-asset and property may all feature within the alternative's classification.

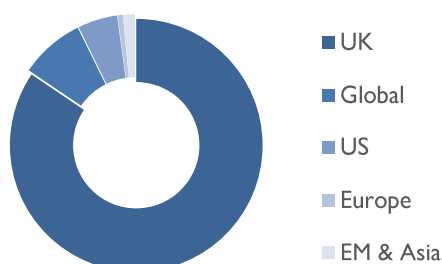
The portfolio seeks to generate higher capital growth over the medium to long term (5 – 7 years or more) by employing a more dynamic investment strategy. The portfolio will have a higher exposure to equities compared to Active Balanced - typically comprising 70% equity and 30% non-equity - though weightings may deviate within set parameters, allowing managers to react to market conditions.

## PERFORMANCE

Cumulative Return %				
1 Year	3 Year	5 Year	10 Year	Inception
12.99	9.32	33.84	77.74	153.26
Calendar Year Returns %			Annualised %	
2022	2023	2024 YTD	Return	Volatility
-8.43	7.91	7.24	7.17	8.09

All performance figures are net of TAM's investment management fee.

## REGIONAL EXPOSURE



## PORTFOLIO INFORMATION

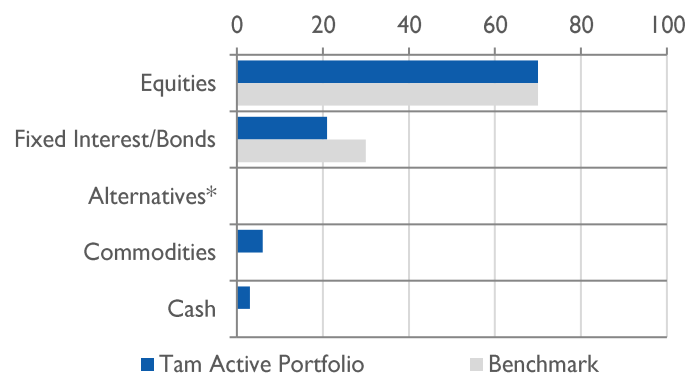
Portfolio Benchmark	Bloomberg Global EQ:FI 70:30
Inception Date	01 October 2011
Minimum Investment	Any size

### Charges<sup>1</sup>

TAM AMC	0.30%
TAM Platform Fee	0.25%
Underlying Fund Charge	0.54%

<sup>1</sup>VAT will be added where applicable.

## ASSET ALLOCATION



\*Absolute return, multi-asset and property may all feature within the alternative's classification.

## TOP 5 HOLDINGS

1. iShares Developed World Index Inst Acc GBP (IE)	15.0%
2. Fidelity S&P 500 Index P H Acc GBP	13.5%
3. BNY Mellon US Equity Income Fund W H Acc GBP	11.0%
4. J O Hambro Global Opportunities X Acc GBP	7.0%
5. Capital Group Global Corporate Bond Fund Zh Acc GBP	6.0%
<b>Top 5 holdings as % of whole portfolio</b>	<b>52.5%</b>
<b>Total number of holdings</b>	<b>15</b>