

Defaqto Defensive Comparator

5 year cumulative to year end 2023

Rank	Portfolio name	Return
1	Quilter WealthSelect Managed Blend 4 - Platform	27.2%
2	Rivers Cautious Portfolio - Platform	27.0%
3	Quilter WealthSelect Managed Active 4 - Platform	26.4%
4	Copia Select Accumulation Moderate -Platform	25.1%
5	Waverton Defensive Portfolio - Platform	24.7%
6	OFNPM Cautious (Passive) - Platform	23.9%
7	Schroder Sustainable Portfolio 3 - Platform	22.9%
8	Waverton Conservative Portfolio - Platform	22.2%
9	Quilter WealthSelect Managed Blend 3 - Platform	21.9%
10	Schroder Active Portfolio 3 - Platform	21.8%
11	Alpha Beta Partners AB Core Plus Cautious - Platform	21.6%
12	ebi Vantage World 40 - Platform	21.5%
13	Quilter WealthSelect Managed Active 3 - Platform	21.5%
14	Fundment 30% Equity - Platform	21.4%
15	Bordier Hybrid Passive Managed Service Cautious - Platform	20.6%
16	Schroder Strategic Index Portfolio 3 - Platform	20.6%
17	OFNPM Cautious (Active) - Platform	20.5%
18	Evelyn Partners Core Conservative - Platform	20.4%
19	Bordier Cautious - Platform	20.3%
20	OFNPM Defensive (Passive) - Platform	19.9%

Defaqto Cautious Comparator

5 year cumulative to year end 2023

Rank	Portfolio name	Return
1	Waverton Balanced Portfolio - Platform	42.8%
2	AJ Bell Passive MPS 3 - Platform	41.2%
3	Credo MAP Core 60/40 - Platform	38.6%
4	Quilter WealthSelect Managed Blend 6 - Platform	37.1%
5	AJ Bell Active MPS 3 - Platform	36.8%
6	Quilter WealthSelect Managed Active 6 - Platform	36.6%
7	Fundment 50% Equity - Platform	35.7%
8	OFNPM Balanced (Passive) - Platform	34.6%
9	Rivers Balanced Portfolio - Platform	33.2%
10	Arbuthnot Global MPS Balanced - Platform	33.1%
11	Timeline ESG Tracker - 50 - Platform	32.8%
12	AJ Bell Active MPS Income 1 - Platform	32.8%
13	Waverton Cautious Portfolio - Platform	32.3%
14	Quilter WealthSelect Managed Blend 5 - Platform	32.1%
15	AJ Bell Passive MPS Income 1 - Platform	31.9%
16	Quilter WealthSelect Managed Active 5 - Platform	31.7%
17	ebi Vantage World 60 - Platform	31.6%
18	PAM Balanced Global Growth Portfolio - Platform	31.2%
19	OFNPM Balanced (Active) - Platform	30.4%
20	Cornelian RM Passive 5 - Platform	30.1%

Defaqto Balanced Comparator

5 year cumulative to year end 2023

Rank	Portfolio name	Return
1	Waverton Growth Portfolio - Platform	51.6%
2	AJ Bell Passive MPS 4 - Platform	48.2%
3	Credo MAP Core 70/30 - Platform	45.9%
4	Fundment 60% Equity - Platform	44.3%
5	Morningstar Moderately Adventurous Passive Portfolio - Platform	43.2%
6	OFNPM Growth (Passive) - Platform	43.1%
7	PAM Adventurous Global Growth Portfolio - Platform	42.7%
8	Quilter WealthSelect Managed Blend 7 - Platform	42.3%
9	Quilter WealthSelect Managed Active 7 - Platform	42.0%
10	Alpha Beta Partners AB Core Plus Balanced - Platform	42.0%
11	Charles Stanley Multi Manager Inc4 - Platform	41.2%
12	Timeline ESG Tracker - 60 - Platform	40.2%
13	Arbuthnot Global MPS Balanced Growth - Platform	40.1%
14	Tatton Ethical Balanced - Platform	40.0%
15	Brooks Macdonald Medium Risk (Active): (Income & Growth) - Platform	38.8%
16	Schroder Strategic Index Portfolio 6 - Platform	38.5%
17	HSBC Global MPS Balanced - Platform	38.5%
18	Rivers Adventurous Portfolio - Platform	37.8%
19	Brooks Macdonald Medium Risk (Passive): (Income & Growth) - Platform	37.8%
20	OFNPM Growth (Active) - Platform	37.5%

Defaqto Growth Comparator

5 year cumulative to year end 2023

Rank	Portfolio name	Return
1	PAM Aggressive Growth Portfolio - Platform	60.5%
2	AJ Bell Passive MPS 5 - Platform	58.8%
3	Quilter WealthSelect Managed Blend 9 - Platform	57.1%
4	HSBC Global MPS Dynamic - Platform	56.6%
5	Quilter WealthSelect Managed Active 9 - Platform	55.9%
6	Timeline ESG Tracker - 80 - Platform	55.3%
7	Schroder Active Portfolio 7 - Platform	53.1%
8	Fundment 80% Equity - Platform	52.8%
9	Alpha Beta Partners AB Core Plus Balanced Growth - Platform	51.3%
10	Schroder Sustainable Portfolio 7 - Platform	50.9%
11	Fundhouse Global Growth - Platform	50.9%
12	Morningstar Adventurous Passive Portfolio - Platform	50.4%
13	Timeline ESG Classic - 80 - Platform	50.0%
14	Schroder Strategic Index Portfolio 8 - Platform	49.7%
15	Tatton Ethical Active - Platform	49.6%
16	Quilter WealthSelect Managed Blend 8 - Platform	49.3%
17	Quilter WealthSelect Managed Active 8 - Platform	48.6%
18	Fundment 70% Equity - Platform	48.2%
19	AJ Bell Active MPS 5 - Platform	48.1%
20	PAM Aggressive Global Growth Portfolio - Platform	48.0%

Defaqto Adventurous Comparator

5 year cumulative to year end 2023

Rank	Portfolio name	Return
1	Timeline ESG Tracker - 100 - Platform	71.5%
2	Quilter Cheviot Global Growth - Platform	70.4%
3	Tatton Managed Global Equity - Platform	68.6%
4	Tatton Core Global Equity - Platform	67.5%
5	Tatton Tracker Global Equity - Platform	66.4%
6	Schroder Active Portfolio 9 - Platform	64.8%
7	Fundhouse Global Equity - Platform	64.7%
8	HSBC Global MPS Adventurous - Platform	64.7%
9	Tatton Ethical Global Equity - Platform	64.2%
10	Timeline ESG Classic - 100 - Platform	64.1%
11	Fundment 100% Equity - Platform	64.0%
12	Parmenion Vanguard LifeStrategy Portfolio 10 - Platform	63.5%
13	Timeline ESG Tracker - 90 - Platform	63.1%
14	Quilter WealthSelect Managed Blend 10 - Platform	62.9%
15	FE Investments Hybrid 5 Short Term - Platform	61.8%
16	Quilter WealthSelect Managed Active 10 - Platform	61.2%
17	Walker Crips MPS Collectives Global Growth - Platform	60.2%
18	P1 Asset Tracker Adventurous - Platform	60.1%
19	Tatton Ethical Aggressive - Platform	59.9%
20	Fundment 90% Equity - Platform	58.1%