

defaqto mps comparator

Investment report - MPS Platform

5 year cumulative performance to the end of February 2026

Rank	Fund name	Defaqto MPS Comparator	5 Yr Cum Return	5 Yr Volatility	5 Yr Quartile	Total Cost
1	EPIC MPS Risk Targeted Managed 3	Defensive	53.31%	4.71	Top	0.76%
2	Ascencia Portfolio of Sharia Compliant Solutions 4	Defensive	52.91%	5.56	Top	1.19%
3	Quilter WealthSelect Managed Blend 5	Defensive	37.93%	4.42	Top	0.72%
4	Quilter WealthSelect Managed Active 5	Defensive	37.13%	4.39	Top	0.89%
5	Collidr Select Active 4	Defensive	36.72%	4.58	Top	0.78%
6	Rivers Cautious Portfolio	Defensive	36.40%	3.90	Top	0.93%
7	Ascencia Safety First 5	Defensive	36.23%	4.49	Top	1.03%
8	Collidr Select Income 5	Defensive	36.13%	4.45	Top	2.12%
9	Evelyn Partners Core Conservative	Defensive	35.86%	4.17	Top	0.62%
10	IBOSS Decumulation Portfolio 2	Defensive	35.27%	4.82	Top	0.81%
11	Titan Square Mile Income	Defensive	34.85%	4.48	Top	0.97%
12	Sparrows Capital SCore Market Equity 40 (Funds)	Defensive	34.27%	4.21	Top	0.24%
13	Collidr Select Hybrid 4	Defensive	34.19%	4.36	Top	0.65%
14	Brooks Macdonald Low to Medium Risk (Income)	Defensive	33.59%	4.12	Top	0.69%
15	Ascencia Safety First 4	Defensive	32.76%	3.88	Top	0.99%
16	OFNPM Cautious (Passive)	Defensive	31.53%	3.94	Top	0.28%
17	Collidr Select Income 4	Defensive	30.91%	3.89	Top	2.35%
18	Brooks Macdonald Risk Controlled MPS 4	Defensive	30.90%	4.37	Top	0.58%
19	Copia Select Accumulation Moderate	Defensive	30.89%	4.74	Top	0.32%
20	Quilter WealthSelect Managed Blend 4	Defensive	30.54%	3.72	Top	0.72%
	#1: Defaqto MPS Comparator Defensive (Active)	Defensive	18.83%	3.47		0.72%
	#1: Defaqto MPS Comparator Defensive	Defensive	16.73%	3.48		0.60%
	#1: Defaqto MPS Comparator Defensive (Passive)	Defensive	14.61%	3.51		0.31%

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1	Ascencia Portfolio of Sharia Compliant Solutions 5	Cautious	63.85%	7.03	Top	1.11%
2	TEAM Multi-Asset Conservative Portfolio	Cautious	55.06%	6.76	Top	0.98%
3	Quilter WealthSelect Managed Active 7	Cautious	51.80%	6.69	Top	0.99%
4	Tatton Income Balanced	Cautious	51.08%	6.43	Top	0.96%
5	Brooks Macdonald Medium Risk (Income)	Cautious	49.37%	6.44	Top	0.78%
6	Collidr Select Income 7	Cautious	47.06%	6.60	Top	1.66%
7	Collidr Select Hybrid 6	Cautious	46.34%	6.85	Top	0.55%
8	Quilter WealthSelect Managed Blend 6	Cautious	46.16%	6.17	Top	0.72%
9	AJ Bell Passive MPS Income 1	Cautious	46.14%	6.61	Top	0.39%
10	Rivers Balanced Portfolio	Cautious	46.11%	5.83	Top	0.99%
11	AJ Bell Passive MPS 3	Cautious	45.67%	6.53	Top	0.30%
12	Fundhouse Responsible Global Balanced	Cautious	45.34%	6.77	Top	0.71%
13	OFNPM Balanced (Passive)	Cautious	45.32%	6.31	Top	0.27%
14	Drumnor Investments Steady Model Portfolio	Cautious	45.02%	6.72	Top	0.62%
15	Evelyn Partners Core Balanced	Cautious	44.53%	6.47	Top	0.68%
16	Quilter WealthSelect Managed Active 6	Cautious	44.45%	6.03	Top	0.94%
17	Copia Select Accumulation Balanced	Cautious	44.36%	6.77	Top	0.34%
18	Quorum Capital Conservative Portfolio (RG2aUK)	Cautious	43.93%	6.98	Top	0.59%
19	AJ Bell Active MPS 3	Cautious	43.45%	6.51	Top	0.76%
20	IBOSS Decumulation Portfolio 4	Cautious	43.42%	6.77	Top	0.86%
	#2: Defaqto MPS Comparator Cautious (Passive)	Cautious	30.20%	6.03		0.34%
	#2: Defaqto MPS Comparator Cautious	Cautious	27.55%	6.04		0.62%
	#2: Defaqto MPS Comparator Cautious (Active)	Cautious	27.44%	5.97		0.74%

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Rank	Fund name	Defaqto MPS Comparator	5 Yr Cum Return	5 Yr Volatility	5 Yr Quartile	Total Cost
1	EPIC MPS Risk Targeted Managed 5	Balanced	71.82%	7.26	Top	0.88%
2	Tatton Income Active	Balanced	67.24%	7.23	Top	1.05%
3	Quilter WealthSelect Managed Blend 8	Balanced	62.26%	7.61	Top	0.72%
4	Fundhouse Responsible Global Growth	Balanced	61.63%	7.76	Top	0.79%
5	Voyager Growth (Direct Equity)	Balanced	60.71%	7.51	Top	1.04%
6	Morningstar Moderately Adventurous Passive Portfolio	Balanced	60.50%	7.47	Top	0.36%
7	Quilter WealthSelect Managed Active 8	Balanced	59.44%	7.42	Top	1.02%
8	Collidr Select Income 9	Balanced	58.58%	7.76	Top	1.21%
9	Fundhouse Global Growth	Balanced	58.41%	7.19	Top	0.90%
10	AJ Bell Passive MPS 4	Balanced	58.12%	7.44	Top	0.30%
11	OFNPM Growth (Passive)	Balanced	58.01%	7.71	Top	0.28%
12	Parmenion Income - Risk Grade 8	Balanced	57.64%	7.79	Top	1.01%
13	Drumnor Investments Moderate Model Portfolio	Balanced	57.07%	7.3	Top	0.63%
14	Tatton Classic Tracker Active	Balanced	56.23%	7.62	Top	0.39%
15	Voyager Higher Income (Direct Equity)	Balanced	55.82%	7.17	Top	1.28%
16	Oakglen Wealth Enhance Portfolio	Balanced	55.77%	7.82	Top	1.09%
17	Tatton Classic Core Active	Balanced	54.97%	7.53	Top	0.63%
18	Parmenion Passive Growth - Risk Grade 7	Balanced	54.62%	7.44	Top	0.43%
19	Binary Islamic Balanced	Balanced	54.25%	7.8	Top	0.83%
20	Charles Stanley Multi Manager Inc4	Balanced	54.05%	7.27	Top	0.92%
	#3: Defaqto MPS Comparator Balanced (Passive)	Balanced	40.32%	7.06		0.32%
	#3: Defaqto MPS Comparator Balanced	Balanced	35.22%	7.15		0.68%
	#3: Defaqto MPS Comparator Balanced (Active)	Balanced	34.80%	7.00		0.78%

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Rank	Fund name	Defaqto MPS Comparator	5 Yr Cum Return	5 Yr Volatility	5 Yr Quartile	Total Cost
1	EPIC MPS Risk Targeted Managed 7	Growth	87.09%	8.11	Top	0.90%
2	Aberdeen Index MPS 5	Growth	75.08%	8.46	Top	0.20%
3	Parmenion Distribution Technology Passive - Risk Grade 7	Growth	75.06%	9.19	Top	0.72%
4	AJ Bell Passive MPS 5	Growth	73.32%	8.10	Top	0.30%
5	7IM Passive Adventurous Plus	Growth	73.17%	9.11	Top	0.26%
6	Fundhouse Global Equity	Growth	72.96%	8.34	Top	0.98%
7	Morningstar Governed Portfolio Adventurous Growth	Growth	72.63%	8.54	Top	0.56%
8	Morningstar Blended Adventurous Portfolio	Growth	72.20%	8.54	Top	0.61%
9	Morningstar Adventurous Passive Portfolio	Growth	72.00%	8.37	Top	0.37%
10	TEAM Multi-Asset Growth Portfolio	Growth	71.97%	9.18	Top	1.04%
11	AJ Bell Passive MPS 6	Growth	70.22%	8.80	Top	0.28%
12	Ascencia Portfolio of Sharia Compliant Solutions 6	Growth	69.89%	8.25	Top	1.06%
13	Pacific Global Aggressive Efficient Portfolio	Growth	69.40%	8.81	Top	0.61%
14	Parmenion Passive Growth - Risk Grade 9	Growth	68.80%	8.66	Top	0.39%
15	Drumnor Investments Progressive Model Portfolio	Growth	68.47%	8.69	Top	0.70%
16	Pacific Aggressive Global Portfolio	Growth	66.96%	8.43	Top	0.72%
17	Pacific Aggressive Portfolio	Growth	66.94%	8.10	Top	0.71%
18	Parmenion Income - Risk Grade 10	Growth	66.79%	8.59	Top	0.99%
19	Morningstar International GBP Moderately Adventurous Growth	Growth	66.77%	7.76	Top	0.54%
20	Quilter WealthSelect Managed Active 10	Growth	66.40%	8.84	Top	0.99%
	#4: Defaqto MPS Comparator Growth (Passive)	Growth	53.62%	7.93		0.34%
	#4: Defaqto MPS Comparator Growth	Growth	43.35%	8.07		0.67%
	#4: Defaqto MPS Comparator Growth (Active)	Growth	39.25%	7.93		0.79%

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Rank	Fund name	Defaqto MPS Comparator	5 Yr Cum Return	5 Yr Volatility	5 Yr Quartile	Total Cost
1	Quorum Capital Aggressive Portfolio (RG5aUK)	Adventurous	86.62%	11.92	Top	0.91%
2	Timeline 0.09% Tracker - 100	Adventurous	85.53%	10.60	Top	0.21%
3	Timeline 0.15% Tracker - 100	Adventurous	85.15%	10.60	Top	0.27%
4	Quorum Capital Adventurous Portfolio (RG4aUK)	Adventurous	82.30%	11.67	Top	0.83%
5	Morningstar International GBP Adventurous Growth	Adventurous	81.67%	8.63	Top	0.56%
6	Tatton Income Aggressive	Adventurous	80.39%	7.92	Top	1.09%
7	Parmenion Vanguard LifeStrategy Portfolio 10	Adventurous	79.38%	9.95	Top	0.29%
8	Pacific Aggressive Passive Portfolio	Adventurous	79.34%	9.47	Top	0.25%
9	Saltus Global Markets - Adventurous	Adventurous	79.24%	10.34	Top	0.55%
10	Sparrows Capital SCore Market Equity 100 (Funds)	Adventurous	79.03%	10.37	Top	0.24%
11	Collidr Select Active 10	Adventurous	79.03%	10.75	Top	0.67%
12	Binary Islamic Adventurous	Adventurous	78.50%	11.26	Top	0.69%
13	P1 Asset Tracker Adventurous	Adventurous	76.80%	9.65	Top	0.23%
14	Quorum Capital Balanced Portfolio (RG3aUK)	Adventurous	76.48%	10.23	Top	0.78%
15	Timeline 0.09% Tracker - 90	Adventurous	76.28%	9.94	Top	0.20%
16	Timeline 0.15% Tracker - 90	Adventurous	75.91%	9.94	Top	0.26%
17	Parmenion Passive Growth - Risk Grade 10	Adventurous	74.81%	9.42	Top	0.32%
18	Tatton Classic Tracker Global Equity	Adventurous	74.44%	10.03	Top	0.29%
19	Brewin Dolphin MPS Global Equity Passive Plus	Adventurous	74.12%	9.92	Top	0.29%
20	Tatton Classic Core Global Equity	Adventurous	73.84%	10.03	Top	0.61%
	#5: Defaqto MPS Comparator Adventurous (Passive)	Adventurous				
	#5: Defaqto MPS Comparator Adventurous	Adventurous				
	#5: Defaqto MPS Comparator Adventurous (Active)	Adventurous				

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