



# DFM MPS (Direct) Portfolio Families

Family name	Diamond Rating	Fund name
7IM Active	5	7IM Cautious Portfolio Active
7IM Active	5	7IM Moderately Cautious Portfolio Active
7IM Active	5	7IM Balanced Portfolio Active
7IM Active	5	7IM Moderately Adventurous Portfolio Active
7IM Active	5	7IM Adventurous Portfolio Active
7IM Active	5	7IM Adventurous Plus Portfolio Active
7IM Blended	5	7IM Cautious Portfolio Blended
7IM Blended	5	7IM Moderately Cautious Portfolio Blended
7IM Blended	5	7IM Balanced Portfolio Blended
7IM Blended	5	7IM Moderately Adventurous Portfolio Blended
7IM Blended	5	7IM Adventurous Portfolio Blended
7IM Blended	5	7IM Adventurous Plus Portfolio Blended
7IM Passive	5	7IM Cautious Portfolio Passive
7IM Passive	5	7IM Moderately Cautious Portfolio Passive
7IM Passive	5	7IM Balanced Portfolio Passive
7IM Passive	5	7IM Moderately Adventurous Portfolio Passive
7IM Passive	5	7IM Adventurous Portfolio Passive
7IM Passive	5	7IM Adventurous Plus Portfolio Passive
7IM Responsible Choice	5	7IM Cautious Portfolio Responsible Choice
7IM Responsible Choice	5	7IM Moderately Cautious Portfolio Responsible Choice
7IM Responsible Choice	5	7IM Balanced Portfolio Responsible Choice
7IM Responsible Choice	5	7IM Moderately Adventurous Portfolio Responsible Choice
7IM Responsible Choice	5	7IM Adventurous Portfolio Responsible Choice
abrdn Index MPS	5	abrdn Index MPS 1
abrdn Index MPS	5	abrdn Index MPS 2
abrdn Index MPS	5	abrdn Index MPS 3



Family name	Diamond Rating	Fund name
abrdr Index MPS	5	abrdr Index MPS 4
abrdr Index MPS	5	abrdr Index MPS 5
abrdr MPS	5	abrdr MPS 1
abrdr MPS	5	abrdr MPS 2
abrdr MPS	5	abrdr MPS 3
abrdr MPS	5	abrdr MPS 4
abrdr MPS	5	abrdr MPS 5
AJ Bell Active	5	AJ Bell Active MPS 1
AJ Bell Active	5	AJ Bell Active MPS 2
AJ Bell Active	5	AJ Bell Active MPS 3
AJ Bell Active	5	AJ Bell Active MPS 4
AJ Bell Active	5	AJ Bell Active MPS 5
AJ Bell Active	5	AJ Bell Active MPS 6
AJ Bell Passive	5	AJ Bell Passive MPS 1
AJ Bell Passive	5	AJ Bell Passive MPS 2
AJ Bell Passive	5	AJ Bell Passive MPS 3
AJ Bell Passive	5	AJ Bell Passive MPS 4
AJ Bell Passive	5	AJ Bell Passive MPS 5
AJ Bell Passive	5	AJ Bell Passive MPS 6
Arbuthnot Global MPS	5	Arbuthnot Global Investment Service Portfolio 1
Arbuthnot Global MPS	5	Arbuthnot Global Investment Service Portfolio 2
Arbuthnot Global MPS	5	Arbuthnot Global Investment Service Portfolio 3
Arbuthnot Global MPS	5	Arbuthnot Global Investment Service Portfolio 4
Arbuthnot Global MPS	5	Arbuthnot Global Investment Service Portfolio 5
Arbuthnot Global MPS	5	Arbuthnot Global Investment Service Portfolio 6
BMAM MPS	5	Brooks Macdonald Low Risk (Defensive Income)
BMAM MPS	5	Brooks Macdonald Low to Medium Risk (Income)
BMAM MPS	5	Brooks Macdonald Low to Medium Risk (Active): (Income & Growth)



Family name	Diamond Rating	Fund name
BMAM MPS	5	Brooks Macdonald Medium Risk (Income)
BMAM MPS	5	Brooks Macdonald Medium Risk (Active): (Income & Growth)
BMAM MPS	5	Brooks Macdonald Medium to High Risk (Growth)
BMAM MPS	5	Brooks Macdonald High Risk (Growth)
BMAM MPS Passive	5	Brooks Macdonald Low to Medium Risk (Passive): (Income & Growth)
BMAM MPS Passive	5	Brooks Macdonald Medium Risk (Passive): (Income & Growth)
BMAM MPS Passive	5	Brooks Macdonald Medium to High Risk (Passive): (Growth)
Bordier Hybrid Passive MPS	5	Bordier Hybrid Passive Managed Service Defensive
Bordier Hybrid Passive MPS	5	Bordier Hybrid Passive Managed Service Cautious
Bordier Hybrid Passive MPS	5	Bordier Hybrid Passive Managed Service Balanced
Bordier Hybrid Passive MPS	5	Bordier Hybrid Passive Managed Service Growth
Bordier Hybrid Passive MPS	5	Bordier Hybrid Passive Managed Service Adventurous
Bordier Hybrid Passive Risk Targeted MPS	5	Bordier Hybrid Passive Risk Targeted (RT) Managed Service RT3
Bordier Hybrid Passive Risk Targeted MPS	5	Bordier Hybrid Passive Risk Targeted (RT) Managed Service RT4
Bordier Hybrid Passive Risk Targeted MPS	5	Bordier Hybrid Passive Risk Targeted (RT) Managed Service RT5
Bordier Hybrid Passive Risk Targeted MPS	5	Bordier Hybrid Passive Risk Targeted (RT) Managed Service RT6
Bordier Hybrid Passive Risk Targeted MPS	5	Bordier Hybrid Passive Risk Targeted (RT) Managed Service RT7
Bordier MPS	5	Bordier Defensive
Bordier MPS	5	Bordier Cautious
Bordier MPS	5	Bordier Balanced
Bordier MPS	5	Bordier Growth



Family name	Diamond Rating	Fund name
Bordier MPS	5	Bordier Adventurous
Bordier MPS Income	5	Bordier Managed Portfolio Service (MPS) Defensive Income
Bordier MPS Income	5	Bordier Managed Portfolio Service (MPS) Cautious Income
Bordier MPS Income	5	Bordier Managed Portfolio Service (MPS) Balanced Income
Bordier MPS Income	5	Bordier Managed Portfolio Service (MPS) Growth Income
Bordier MPS Income	5	Bordier Managed Portfolio Service (MPS) Adventurous Income
Bordier Risk Targeted MPS	5	Bordier Risk Targeted (RT) Managed Service RT3
Bordier Risk Targeted MPS	5	Bordier Risk Targeted (RT) Managed Service RT4
Bordier Risk Targeted MPS	5	Bordier Risk Targeted (RT) Managed Service RT5
Bordier Risk Targeted MPS	5	Bordier Risk Targeted (RT) Managed Service RT6
Bordier Risk Targeted MPS	5	Bordier Risk Targeted (RT) Managed Service RT7
Charles Stanley MM Income	5	Charles Stanley Multi Manager Inc1
Charles Stanley MM Income	5	Charles Stanley Multi Manager Inc2
Charles Stanley MM Income	5	Charles Stanley Multi Manager Inc3
Charles Stanley MM Income	5	Charles Stanley Multi Manager Inc4
Charles Stanley MM Income	5	Charles Stanley Multi Manager Inc5
Charles Stanley MM Total Return	5	Charles Stanley Multi Manager TR1
Charles Stanley MM Total Return	5	Charles Stanley Multi Manager TR2
Charles Stanley MM Total Return	5	Charles Stanley Multi Manager TR3
Charles Stanley MM Total Return	5	Charles Stanley Multi Manager TR4
Charles Stanley MM Total Return	5	Charles Stanley Multi Manager TR5
Close DMS	5	Close DMS Conservative
Close DMS	5	Close DMS Balanced
Close DMS	5	Close DMS Growth



Family name	Diamond Rating	Fund name
Close SRI	5	Close SRI Conservative
Close SRI	5	Close SRI Balanced
Close SRI	5	Close SRI Growth
Copia Select	5	Copia Select Accumulation Cautious
Copia Select	5	Copia Select Accumulation Moderate
Copia Select	5	Copia Select Accumulation Balanced
Copia Select	5	Copia Select Accumulation Growth
Copia Select	5	Copia Select Accumulation Equity
Cornelian MPS	5	Cornelian Defensive
Cornelian MPS	5	Cornelian Cautious
Cornelian MPS	5	Cornelian Managed Growth
Cornelian MPS	5	Cornelian Growth
Cornelian MPS	5	Cornelian Progressive
Credo MAP	5	Credo MAP 20/80
Credo MAP	5	Credo MAP 45/55
Credo MAP	5	Credo MAP 60/40
Credo MAP	5	Credo MAP 70/30
Evelyn Partners MPS	5	Evelyn Partners Core Defensive
Evelyn Partners MPS	5	Evelyn Partners Core Conservative
Evelyn Partners MPS	5	Evelyn Partners Core Cautious
Evelyn Partners MPS	5	Evelyn Partners Core Balanced
Evelyn Partners MPS	5	Evelyn Partners Core Growth
Evelyn Partners MPS	5	Evelyn Partners Core Adventurous
Evelyn Partners MPS	5	Evelyn Partners Core Maximum Growth
Evelyn Partners SMPS	5	Evelyn Partners Sustainable Conservative
Evelyn Partners SMPS	5	Evelyn Partners Sustainable Cautious
Evelyn Partners SMPS	5	Evelyn Partners Sustainable Balanced
Evelyn Partners SMPS	5	Evelyn Partners Sustainable Growth
Evelyn Partners SMPS	5	Evelyn Partners Sustainable Adventurous



Family name	Diamond Rating	Fund name
Evelyn Partners SMPS	5	Evelyn Partners Sustainable Maximum Growth
Fundment MPS	5	Fundment 20% Equity
Fundment MPS	5	Fundment 30% Equity
Fundment MPS	5	Fundment 40% Equity
Fundment MPS	5	Fundment 50% Equity
Fundment MPS	5	Fundment 60% Equity
Fundment MPS	5	Fundment 70% Equity
Fundment MPS	5	Fundment 80% Equity
Fundment MPS	5	Fundment 90% Equity
Fundment MPS	5	Fundment 100% Equity
LGT Vestra MPS	5	LGT Wealth Defensive
LGT Vestra MPS	5	LGT Wealth Cautious
LGT Vestra MPS	5	LGT Wealth Balanced
LGT Vestra MPS	5	LGT Wealth Growth
LGT Vestra MPS	5	LGT Wealth Adventurous
Liontrust WSS Dynamic Passive	5	Liontrust WSS Dynamic Passive 1
Liontrust WSS Dynamic Passive	5	Liontrust WSS Dynamic Passive 2
Liontrust WSS Dynamic Passive	5	Liontrust WSS Dynamic Passive 3
Liontrust WSS Dynamic Passive	5	Liontrust WSS Dynamic Passive 4
Liontrust WSS Dynamic Passive	5	Liontrust WSS Dynamic Passive 5
Liontrust WSS Dynamic Passive	5	Liontrust WSS Dynamic Passive 6
Liontrust WSS Dynamic Passive	5	Liontrust WSS Dynamic Passive 7
Liontrust WSS Dynamic Passive	5	Liontrust WSS Dynamic Passive 8
Liontrust WSS Dynamic Passive	5	Liontrust WSS Dynamic Passive 9



Family name	Diamond Rating	Fund name
Liontrust WSS Dynamic Passive	5	Liontrust WSS Dynamic Passive 10
Liontrust WSS Blended Growth	5	Liontrust WSS Blended Growth 1
Liontrust WSS Blended Growth	5	Liontrust WSS Blended Growth 2
Liontrust WSS Blended Growth	5	Liontrust WSS Blended Growth 3
Liontrust WSS Blended Growth	5	Liontrust WSS Blended Growth 4
Liontrust WSS Blended Growth	5	Liontrust WSS Blended Growth 5
Liontrust WSS Blended Growth	5	Liontrust WSS Blended Growth 6
Liontrust WSS Blended Growth	5	Liontrust WSS Blended Growth 7
Liontrust WSS Blended Growth	5	Liontrust WSS Blended Growth 8
Liontrust WSS Blended Growth	5	Liontrust WSS Blended Growth 9
Liontrust WSS Blended Growth	5	Liontrust WSS Blended Growth 10
Liontrust WSS Blended Income	5	Liontrust WSS Blended Income 1
Liontrust WSS Blended Income	5	Liontrust WSS Blended Income 2
Liontrust WSS Blended Income	5	Liontrust WSS Blended Income 3
Liontrust WSS Blended Income	5	Liontrust WSS Blended Income 4
Liontrust WSS Blended Income	5	Liontrust WSS Blended Income 5
Liontrust WSS Blended Income	5	Liontrust WSS Blended Income 6
Parmenion DT Passive	5	Parmenion Distribution Technology Passive - Risk Grade 1
Parmenion DT Passive	5	Parmenion Distribution Technology Passive - Risk Grade 2



Family name	Diamond Rating	Fund name
Parmenion DT Passive	5	Parmenion Distribution Technology Passive - Risk Grade 3
Parmenion DT Passive	5	Parmenion Distribution Technology Passive - Risk Grade 4
Parmenion DT Passive	5	Parmenion Distribution Technology Passive - Risk Grade 5
Parmenion DT Passive	5	Parmenion Distribution Technology Passive - Risk Grade 6
Parmenion DT Passive	5	Parmenion Distribution Technology Passive - Risk Grade 7
Parmenion DT Passive	5	Parmenion Distribution Technology Passive - Risk Grade 8
Parmenion DT Passive	5	Parmenion Distribution Technology Passive - Risk Grade 9
Parmenion DT Passive	5	Parmenion Distribution Technology Passive - Risk Grade 10
Parmenion Strategic Passive	5	Parmenion Strategic Passive - Risk Grade 1
Parmenion Strategic Passive	5	Parmenion Strategic Passive - Risk Grade 2
Parmenion Strategic Passive	5	Parmenion Strategic Passive - Risk Grade 3
Parmenion Strategic Passive	5	Parmenion Strategic Passive - Risk Grade 4
Parmenion Strategic Passive	5	Parmenion Strategic Passive - Risk Grade 5
Parmenion Strategic Passive	5	Parmenion Strategic Passive - Risk Grade 6
Parmenion Strategic Passive	5	Parmenion Strategic Passive - Risk Grade 7
Parmenion Strategic Passive	5	Parmenion Strategic Passive - Risk Grade 8
Parmenion Strategic Passive	5	Parmenion Strategic Passive - Risk Grade 9
Parmenion Strategic Passive	5	Parmenion Strategic Passive - Risk Grade 10
Parmenion Vanguard LifeStrategy	5	Parmenion Vanguard LifeStrategy Portfolio 1
Parmenion Vanguard LifeStrategy	5	Parmenion Vanguard LifeStrategy Portfolio 2
Parmenion Vanguard LifeStrategy	5	Parmenion Vanguard LifeStrategy Portfolio 3
Parmenion Vanguard LifeStrategy	5	Parmenion Vanguard LifeStrategy Portfolio 4





Family name	Diamond Rating	Fund name
Parmenion Vanguard LifeStrategy	5	Parmenion Vanguard LifeStrategy Portfolio 5
Parmenion Vanguard LifeStrategy	5	Parmenion Vanguard LifeStrategy Portfolio 6
Parmenion Vanguard LifeStrategy	5	Parmenion Vanguard LifeStrategy Portfolio 7
Parmenion Vanguard LifeStrategy	5	Parmenion Vanguard LifeStrategy Portfolio 8
Parmenion Vanguard LifeStrategy	5	Parmenion Vanguard LifeStrategy Portfolio 9
Parmenion Vanguard LifeStrategy	5	Parmenion Vanguard LifeStrategy Portfolio 10
Premier MPS	5	Premier Miton Capital Builder Portfolio
Premier MPS	5	Premier Miton Capital Builder Plus Portfolio
Premier MPS	5	Premier Miton Conservative Portfolio
Premier MPS	5	Premier Miton Balanced Portfolio
Premier MPS	5	Premier Miton Balanced Plus Portfolio
Premier MPS	5	Premier Miton Growth Portfolio
Premier MPS	5	Premier Miton Growth Plus Portfolio
Premier MPS	5	Premier Miton Dynamic Growth Portfolio
Quilter Cheviot MPS	5	Quilter Cheviot Cautious
Quilter Cheviot MPS	5	Quilter Cheviot Conservative
Quilter Cheviot MPS	5	Quilter Cheviot Income
Quilter Cheviot MPS	5	Quilter Cheviot Balanced
Quilter Cheviot MPS	5	Quilter Cheviot Growth
Quilter Cheviot MPS	5	Quilter Cheviot Global Growth
Quilter WealthSelect Managed Active	5	Quilter WealthSelect Managed Active 3
Quilter WealthSelect Managed Active	5	Quilter WealthSelect Managed Active 4
Quilter WealthSelect Managed Active	5	Quilter WealthSelect Managed Active 5
Quilter WealthSelect Managed Active	5	Quilter WealthSelect Managed Active 6



Family name	Diamond Rating	Fund name
Quilter WealthSelect Managed Active	5	Quilter WealthSelect Managed Active 7
Quilter WealthSelect Managed Active	5	Quilter WealthSelect Managed Active 8
Quilter WealthSelect Managed Active	5	Quilter WealthSelect Managed Active 9
Quilter WealthSelect Managed Active	5	Quilter WealthSelect Managed Active 10
Quilter WealthSelect Managed Blend	5	Quilter WealthSelect Managed Blend 3
Quilter WealthSelect Managed Blend	5	Quilter WealthSelect Managed Blend 4
Quilter WealthSelect Managed Blend	5	Quilter WealthSelect Managed Blend 5
Quilter WealthSelect Managed Blend	5	Quilter WealthSelect Managed Blend 6
Quilter WealthSelect Managed Blend	5	Quilter WealthSelect Managed Blend 7
Quilter WealthSelect Managed Blend	5	Quilter WealthSelect Managed Blend 8
Quilter WealthSelect Managed Blend	5	Quilter WealthSelect Managed Blend 9
Quilter WealthSelect Managed Blend	5	Quilter WealthSelect Managed Blend 10
Quilter WealthSelect Managed Passive	5	Quilter WealthSelect Managed Passive 3
Quilter WealthSelect Managed Passive	5	Quilter WealthSelect Managed Passive 4
Quilter WealthSelect Managed Passive	5	Quilter WealthSelect Managed Passive 5
Quilter WealthSelect Managed Passive	5	Quilter WealthSelect Managed Passive 6
Quilter WealthSelect Managed Passive	5	Quilter WealthSelect Managed Passive 7
Quilter WealthSelect Managed Passive	5	Quilter WealthSelect Managed Passive 8
Quilter WealthSelect Managed Passive	5	Quilter WealthSelect Managed Passive 9



Family name	Diamond Rating	Fund name
Quilter WealthSelect Managed Passive	5	Quilter WealthSelect Managed Passive 10
Quilter WealthSelect Responsible Active	5	Quilter WealthSelect Responsible Active 3
Quilter WealthSelect Responsible Active	5	Quilter WealthSelect Responsible Active 4
Quilter WealthSelect Responsible Active	5	Quilter WealthSelect Responsible Active 5
Quilter WealthSelect Responsible Active	5	Quilter WealthSelect Responsible Active 6
Quilter WealthSelect Responsible Active	5	Quilter WealthSelect Responsible Active 7
Quilter WealthSelect Responsible Active	5	Quilter WealthSelect Responsible Active 8
Quilter WealthSelect Responsible Active	5	Quilter WealthSelect Responsible Active 9
Quilter WealthSelect Responsible Active	5	Quilter WealthSelect Responsible Active 10
Quilter WealthSelect Responsible Blend	5	Quilter WealthSelect Responsible Blend 3
Quilter WealthSelect Responsible Blend	5	Quilter WealthSelect Responsible Blend 4
Quilter WealthSelect Responsible Blend	5	Quilter WealthSelect Responsible Blend 5
Quilter WealthSelect Responsible Blend	5	Quilter WealthSelect Responsible Blend 6
Quilter WealthSelect Responsible Blend	5	Quilter WealthSelect Responsible Blend 7
Quilter WealthSelect Responsible Blend	5	Quilter WealthSelect Responsible Blend 8
Quilter WealthSelect Responsible Blend	5	Quilter WealthSelect Responsible Blend 9
Quilter WealthSelect Responsible Blend	5	Quilter WealthSelect Responsible Blend 10
Quilter WealthSelect Responsible Passive	5	Quilter WealthSelect Responsible Passive 3
Quilter WealthSelect Responsible Passive	5	Quilter WealthSelect Responsible Passive 4



Family name	Diamond Rating	Fund name
Quilter WealthSelect Responsible Passive	5	Quilter WealthSelect Responsible Passive 5
Quilter WealthSelect Responsible Passive	5	Quilter WealthSelect Responsible Passive 6
Quilter WealthSelect Responsible Passive	5	Quilter WealthSelect Responsible Passive 7
Quilter WealthSelect Responsible Passive	5	Quilter WealthSelect Responsible Passive 8
Quilter WealthSelect Responsible Passive	5	Quilter WealthSelect Responsible Passive 9
Quilter WealthSelect Responsible Passive	5	Quilter WealthSelect Responsible Passive 10
Quilter WealthSelect Sustainable Active	5	Quilter WealthSelect Sustainable Active 3
Quilter WealthSelect Sustainable Active	5	Quilter WealthSelect Sustainable Active 4
Quilter WealthSelect Sustainable Active	5	Quilter WealthSelect Sustainable Active 5
Quilter WealthSelect Sustainable Active	5	Quilter WealthSelect Sustainable Active 6
Quilter WealthSelect Sustainable Active	5	Quilter WealthSelect Sustainable Active 7
Quilter WealthSelect Sustainable Active	5	Quilter WealthSelect Sustainable Active 8
Quilter WealthSelect Sustainable Active	5	Quilter WealthSelect Sustainable Active 9
Quilter WealthSelect Sustainable Active	5	Quilter WealthSelect Sustainable Active 10
Rathbone MPS	5	Rathbone Core Strategy 2
Rathbone MPS	5	Rathbone Core Strategy 3
Rathbone MPS	5	Rathbone Core Strategy 4
Rathbone MPS	5	Rathbone Core Strategy 5
Rathbone MPS	5	Rathbone Core Strategy 6
TAM Active	5	TAM Asset Management Active Defensive
TAM Active	5	TAM Asset Management Active Cautious
TAM Active	5	TAM Asset Management Active Balanced



Family name	Diamond Rating	Fund name
TAM Active	5	TAM Asset Management Active Growth
TAM Active	5	TAM Asset Management Active Adventurous
TAM Active	5	TAM Asset Management Active Speculative
TAM ESG	5	TAM Asset Management Sustainable World Defensive
TAM ESG	5	TAM Asset Management Sustainable World Cautious
TAM ESG	5	TAM Asset Management Sustainable World Balanced
TAM ESG	5	TAM Asset Management Sustainable World Growth
TAM ESG	5	TAM Asset Management Sustainable World Adventurous
TAM Passive	5	TAM Asset Management Enhanced Passive Defensive
TAM Passive	5	TAM Asset Management Enhanced Passive Cautious
TAM Passive	5	TAM Asset Management Enhanced Passive Balanced
TAM Passive	5	TAM Asset Management Enhanced Passive Growth
TAM Passive	5	TAM Asset Management Enhanced Passive Adventurous
TAM Sharia	5	TAM Asset Management Sharia Defensive
TAM Sharia	5	TAM Asset Management Sharia Cautious
TAM Sharia	5	TAM Asset Management Sharia Balanced
TAM Sharia	5	TAM Asset Management Sharia Growth
TAM Sharia	5	TAM Asset Management Sharia Adventurous
Titan Private Wealth MPS	5	Titan Low Risk
Titan Private Wealth MPS	5	Titan Medium-Low Risk
Titan Private Wealth MPS	5	Titan Medium Risk
Titan Private Wealth MPS	5	Titan Medium-High Risk
Titan Private Wealth MPS	5	Titan High Risk
True Potential MPS	5	True Potential Defensive Portfolio



Family name	Diamond Rating	Fund name
True Potential MPS	5	True Potential Cautious Portfolio
True Potential MPS	5	True Potential Cautious Plus Portfolio
True Potential MPS	5	True Potential Balanced Portfolio
True Potential MPS	5	True Potential Balanced Plus Portfolio
True Potential MPS	5	True Potential Growth Portfolio
True Potential MPS	5	True Potential Growth Plus Portfolio
True Potential MPS	5	True Potential Aggressive Portfolio
Waverton MPS	5	Waverton Conservative Portfolio
Waverton MPS	5	Waverton Defensive Portfolio
Waverton MPS	5	Waverton Cautious Portfolio
Waverton MPS	5	Waverton Balanced Portfolio
Waverton MPS	5	Waverton Growth Portfolio
Waverton MPS	5	Waverton Equity Portfolio
Whitechurch PMS Dynamic	5	Whitechurch PMS Dynamic Defensive
Whitechurch PMS Dynamic	5	Whitechurch PMS Dynamic Cautious
Whitechurch PMS Dynamic	5	Whitechurch PMS Dynamic Balanced
Whitechurch PMS Dynamic	5	Whitechurch PMS Dynamic Steady Growth
Whitechurch PMS Dynamic	5	Whitechurch PMS Dynamic Growth
abrnd Target Return	4	abrnd Target Return MPS 1
abrnd Target Return	4	abrnd Target Return MPS 2
abrnd Target Return	4	abrnd Target Return MPS 3
abrnd Target Return	4	abrnd Target Return MPS 4
abrnd Target Return	4	abrnd Target Return MPS 5
AJ Bell Pactive	4	AJ Bell Pactive MPS 1
AJ Bell Pactive	4	AJ Bell Pactive MPS 2
AJ Bell Pactive	4	AJ Bell Pactive MPS 3
AJ Bell Pactive	4	AJ Bell Pactive MPS 4
AJ Bell Pactive	4	AJ Bell Pactive MPS 5
AJ Bell Pactive	4	AJ Bell Pactive MPS 6



Family name	Diamond Rating	Fund name
Albert E Sharp RR Models	4	Albert E Sharp Model 1-2
Albert E Sharp RR Models	4	Albert E Sharp Model 2
Albert E Sharp RR Models	4	Albert E Sharp Model 3
Albert E Sharp RR Models	4	Albert E Sharp Model 4
Albert E Sharp RR Models	4	Albert E Sharp Model 5
Albert E Sharp RR Models	4	Albert E Sharp Model 6
Albert E Sharp RR Models	4	Albert E Sharp Model 7
Albert E Sharp RR Models	4	Albert E Sharp Model 8
Albert E Sharp RR Models	4	Albert E Sharp Model 10
Alpha - CO	4	Alpha Portfolio Management Defensive - CO
Alpha - CO	4	Alpha Portfolio Management Cautious - CO
Alpha - CO	4	Alpha Portfolio Management Moderate - CO
Alpha - CO	4	Alpha Portfolio Management Moderately Adventurous - CO
Alpha - CO	4	Alpha Portfolio Management Adventurous - CO
Alpha - CO	4	Alpha Portfolio Management Speculative - CO
Alpha - DEC	4	Alpha Portfolio Management Defensive - DEC
Alpha - DEC	4	Alpha Portfolio Management Cautious - DEC
Alpha - DEC	4	Alpha Portfolio Management Moderate - DEC
Alpha - DEC	4	Alpha Portfolio Management Moderately Adventurous - DEC
Alpha - DEC	4	Alpha Portfolio Management Adventurous - DEC
Alpha - DEC	4	Alpha Portfolio Management Speculative - DEC
Alpha Ethical	4	Alpha Portfolio Management Ethical Cautious
Alpha Ethical	4	Alpha Portfolio Management Ethical Moderate
Alpha Ethical	4	Alpha Portfolio Management Ethical Growth
CGWM ESG	4	CGWM ESG Risk Profile 3
CGWM ESG	4	CGWM ESG Risk Profile 4
CGWM ESG	4	CGWM ESG Risk Profile 5



Family name	Diamond Rating	Fund name
CGWM ESG	4	CGWM ESG Risk Profile 6
CGWM ESG	4	CGWM ESG Risk Profile 7
CGWM MPS	4	CGWM Risk Profile 3
CGWM MPS	4	CGWM Risk Profile 4
CGWM MPS	4	CGWM Risk Profile 5
CGWM MPS	4	CGWM Risk Profile 6
CGWM MPS	4	CGWM Risk Profile 7
CGWM MPS Income	4	CGWM Risk Profile 3 - Income
CGWM MPS Income	4	CGWM Risk Profile 4 - Income
CGWM MPS Income	4	CGWM Risk Profile 5 - Income
Copia Volatility	4	Copia Select Volatility 1
Copia Volatility	4	Copia Select Volatility 2
Copia Volatility	4	Copia Select Volatility 3
Copia Volatility	4	Copia Select Volatility 4
Copia Volatility	4	Copia Select Volatility 5
Copia Volatility	4	Copia Select Volatility 6
Copia Volatility	4	Copia Select Volatility 7
Copia Volatility	4	Copia Select Volatility 8
Copia Volatility	4	Copia Select Volatility 9
Copia Volatility	4	Copia Select Volatility 10
Cornelian Blended	4	Cornelian Blended Defensive
Cornelian Blended	4	Cornelian Blended Cautious
Cornelian Blended	4	Cornelian Blended Managed Growth
Cornelian Blended	4	Cornelian Blended Growth
Cornelian Blended	4	Cornelian Blended Progressive
Cornelian RMP	4	Cornelian Defensive RMP
Cornelian RMP	4	Cornelian Cautious RMP
Cornelian RMP	4	Cornelian Managed Growth RMP
Cornelian RMP	4	Cornelian Growth RMP





Family name	Diamond Rating	Fund name
Cornelian RMP	4	Cornelian Progressive RMP
James Brearley Inclusive	4	James Brearley Conservative
James Brearley Inclusive	4	James Brearley Defensive
James Brearley Inclusive	4	James Brearley Cautious
James Brearley Inclusive	4	James Brearley Balanced
James Brearley Inclusive	4	James Brearley Dynamic
LGT Vestra Sustainable MPS	4	LGT Wealth Sustainable Defensive
LGT Vestra Sustainable MPS	4	LGT Wealth Sustainable Cautious
LGT Vestra Sustainable MPS	4	LGT Wealth Sustainable Balanced
LGT Vestra Sustainable MPS	4	LGT Wealth Sustainable Growth
LGT Vestra Sustainable MPS	4	LGT Wealth Sustainable Adventurous
P1 MPS Passive	4	P1 Asset Tracker Conservative
P1 MPS Passive	4	P1 Asset Tracker Cautious
P1 MPS Passive	4	P1 Asset Tracker Moderate Cautious
P1 MPS Passive	4	P1 Asset Tracker Moderate
P1 MPS Passive	4	P1 Asset Tracker Moderate Adventurous
P1 MPS Passive	4	P1 Asset Tracker Adventurous
Parmenion DT Multi Option Active	4	Parmenion Distribution Technology Multi Option Active - Risk Grade 1
Parmenion DT Multi Option Active	4	Parmenion Distribution Technology Multi Option Active - Risk Grade 2
Parmenion DT Multi Option Active	4	Parmenion Distribution Technology Multi Option Active - Risk Grade 3
Parmenion DT Multi Option Active	4	Parmenion Distribution Technology Multi Option Active - Risk Grade 4
Parmenion DT Multi Option Active	4	Parmenion Distribution Technology Multi Option Active - Risk Grade 5
Parmenion DT Multi Option Active	4	Parmenion Distribution Technology Multi Option Active - Risk Grade 6
Parmenion DT Multi Option Active	4	Parmenion Distribution Technology Multi Option Active - Risk Grade 7
Parmenion DT Multi Option Active	4	Parmenion Distribution Technology Multi Option Active - Risk Grade 8



Family name	Diamond Rating	Fund name
Parmenion DT Multi Option Active	4	Parmenion Distribution Technology Multi Option Active - Risk Grade 9
Parmenion DT Multi Option Active	4	Parmenion Distribution Technology Multi Option Active - Risk Grade 10
Parmenion PIM Tactical Active	4	Parmenion PIM Tactical Active- Risk Grade 1
Parmenion PIM Tactical Active	4	Parmenion PIM Tactical Active- Risk Grade 2
Parmenion PIM Tactical Active	4	Parmenion PIM Tactical Active- Risk Grade 3
Parmenion PIM Tactical Active	4	Parmenion PIM Tactical Active- Risk Grade 4
Parmenion PIM Tactical Active	4	Parmenion PIM Tactical Active- Risk Grade 5
Parmenion PIM Tactical Active	4	Parmenion PIM Tactical Active- Risk Grade 6
Parmenion PIM Tactical Active	4	Parmenion PIM Tactical Active- Risk Grade 7
Parmenion PIM Tactical Active	4	Parmenion PIM Tactical Active- Risk Grade 8
Parmenion PIM Tactical Active	4	Parmenion PIM Tactical Active- Risk Grade 9
Parmenion PIM Tactical Active	4	Parmenion PIM Tactical Active- Risk Grade 10
Parmenion PIM Tactical Income	4	Parmenion PIM Tactical Income - Risk Grade 1
Parmenion PIM Tactical Income	4	Parmenion PIM Tactical Income - Risk Grade 2
Parmenion PIM Tactical Income	4	Parmenion PIM Tactical Income - Risk Grade 3
Parmenion PIM Tactical Income	4	Parmenion PIM Tactical Income - Risk Grade 4
Parmenion PIM Tactical Income	4	Parmenion PIM Tactical Income - Risk Grade 9
Parmenion PIM Tactical Income	4	Parmenion PIM Tactical Income - Risk Grade 10
Parmenion Strategic Conviction	4	Parmenion Strategic Conviction Solution - Risk Grade 1



Family name	Diamond Rating	Fund name
Parmenion Strategic Conviction	4	Parmenion Strategic Conviction Solution - Risk Grade 2
Parmenion Strategic Conviction	4	Parmenion Strategic Conviction Solution - Risk Grade 3
Parmenion Strategic Conviction	4	Parmenion Strategic Conviction Solution - Risk Grade 4
Parmenion Strategic Conviction	4	Parmenion Strategic Conviction Solution - Risk Grade 5
Parmenion Strategic Conviction	4	Parmenion Strategic Conviction Solution - Risk Grade 6
Parmenion Strategic Conviction	4	Parmenion Strategic Conviction Solution - Risk Grade 7
Parmenion Strategic Conviction	4	Parmenion Strategic Conviction Solution - Risk Grade 8
Parmenion Strategic Conviction	4	Parmenion Strategic Conviction Solution - Risk Grade 9
Parmenion Strategic Conviction	4	Parmenion Strategic Conviction Solution - Risk Grade 10
Parmenion Strategic Ethical Active (A)	4	Parmenion Strategic Ethical Active (A) Solution - Risk Grade 1
Parmenion Strategic Ethical Active (A)	4	Parmenion Strategic Ethical Active (A) Solution - Risk Grade 2
Parmenion Strategic Ethical Active (A)	4	Parmenion Strategic Ethical Active (A) Solution - Risk Grade 3
Parmenion Strategic Ethical Active (A)	4	Parmenion Strategic Ethical Active (A) Solution - Risk Grade 4
Parmenion Strategic Ethical Active (A)	4	Parmenion Strategic Ethical Active (A) Solution - Risk Grade 5
Parmenion Strategic Ethical Active (A)	4	Parmenion Strategic Ethical Active (A) Solution - Risk Grade 6
Parmenion Strategic Ethical Active (A)	4	Parmenion Strategic Ethical Active (A) Solution - Risk Grade 7
Parmenion Strategic Ethical Active (A)	4	Parmenion Strategic Ethical Active (A) Solution - Risk Grade 8
Parmenion Strategic Ethical Active (A)	4	Parmenion Strategic Ethical Active (A) Solution - Risk Grade 9
Parmenion Strategic Ethical Active (A)	4	Parmenion Strategic Ethical Active (A) Solution - Risk Grade 10



Family name	Diamond Rating	Fund name
Parmenion Strategic Ethical Active (B)	4	Parmenion Strategic Ethical Active (B) Solution - Risk Grade 1
Parmenion Strategic Ethical Active (B)	4	Parmenion Strategic Ethical Active (B) Solution - Risk Grade 2
Parmenion Strategic Ethical Active (B)	4	Parmenion Strategic Ethical Active (B) Solution - Risk Grade 3
Parmenion Strategic Ethical Active (B)	4	Parmenion Strategic Ethical Active (B) Solution - Risk Grade 4
Parmenion Strategic Ethical Active (B)	4	Parmenion Strategic Ethical Active (B) Solution - Risk Grade 5
Parmenion Strategic Ethical Active (B)	4	Parmenion Strategic Ethical Active (B) Solution - Risk Grade 6
Parmenion Strategic Ethical Active (B)	4	Parmenion Strategic Ethical Active (B) Solution - Risk Grade 7
Parmenion Strategic Ethical Active (B)	4	Parmenion Strategic Ethical Active (B) Solution - Risk Grade 8
Parmenion Strategic Ethical Active (B)	4	Parmenion Strategic Ethical Active (B) Solution - Risk Grade 9
Parmenion Strategic Ethical Active (B)	4	Parmenion Strategic Ethical Active (B) Solution - Risk Grade 10
Parmenion Strategic Ethical Active (C)	4	Parmenion Strategic Ethical Active (C) Solution - Risk Grade 1
Parmenion Strategic Ethical Active (C)	4	Parmenion Strategic Ethical Active (C) Solution - Risk Grade 2
Parmenion Strategic Ethical Active (C)	4	Parmenion Strategic Ethical Active (C) Solution - Risk Grade 3
Parmenion Strategic Ethical Active (C)	4	Parmenion Strategic Ethical Active (C) Solution - Risk Grade 4
Parmenion Strategic Ethical Active (C)	4	Parmenion Strategic Ethical Active (C) Solution - Risk Grade 5
Parmenion Strategic Ethical Active (C)	4	Parmenion Strategic Ethical Active (C) Solution - Risk Grade 6
Parmenion Strategic Ethical Active (C)	4	Parmenion Strategic Ethical Active (C) Solution - Risk Grade 7
Parmenion Strategic Ethical Active (C)	4	Parmenion Strategic Ethical Active (C) Solution - Risk Grade 8
Parmenion Strategic Ethical Active (C)	4	Parmenion Strategic Ethical Active (C) Solution - Risk Grade 9



Family name	Diamond Rating	Fund name
Parmenion Strategic Ethical Active (C)	4	Parmenion Strategic Ethical Active (C) Solution - Risk Grade 10
Parmenion Strategic Ethical Active (D)	4	Parmenion Strategic Ethical Active (D) Solution - Risk Grade 1
Parmenion Strategic Ethical Active (D)	4	Parmenion Strategic Ethical Active (D) Solution - Risk Grade 2
Parmenion Strategic Ethical Active (D)	4	Parmenion Strategic Ethical Active (D) Solution - Risk Grade 3
Parmenion Strategic Ethical Active (D)	4	Parmenion Strategic Ethical Active (D) Solution - Risk Grade 4
Parmenion Strategic Ethical Active (D)	4	Parmenion Strategic Ethical Active (D) Solution - Risk Grade 5
Parmenion Strategic Ethical Active (D)	4	Parmenion Strategic Ethical Active (D) Solution - Risk Grade 6
Parmenion Strategic Ethical Active (D)	4	Parmenion Strategic Ethical Active (D) Solution - Risk Grade 7
Parmenion Strategic Ethical Active (D)	4	Parmenion Strategic Ethical Active (D) Solution - Risk Grade 8
Parmenion Strategic Ethical Active (D)	4	Parmenion Strategic Ethical Active (D) Solution - Risk Grade 9
Parmenion Strategic Ethical Active (D)	4	Parmenion Strategic Ethical Active (D) Solution - Risk Grade 10
Parmenion Strategic Guardian	4	Parmenion Strategic Guardian Solution - Risk Grade 1
Parmenion Strategic Guardian	4	Parmenion Strategic Guardian Solution - Risk Grade 2
Parmenion Strategic Guardian	4	Parmenion Strategic Guardian Solution - Risk Grade 3
Parmenion Strategic Guardian	4	Parmenion Strategic Guardian Solution - Risk Grade 4
Parmenion Strategic Guardian	4	Parmenion Strategic Guardian Solution - Risk Grade 5
Parmenion Strategic Guardian	4	Parmenion Strategic Guardian Solution - Risk Grade 6
Parmenion Strategic Guardian	4	Parmenion Strategic Guardian Solution - Risk Grade 7
Parmenion Strategic Guardian	4	Parmenion Strategic Guardian Solution - Risk Grade 8



Family name	Diamond Rating	Fund name
Parmenion Strategic Guardian	4	Parmenion Strategic Guardian Solution - Risk Grade 9
Parmenion Strategic Guardian	4	Parmenion Strategic Guardian Solution - Risk Grade 10
Parmenion Strategic Multi Option Active	4	Parmenion Strategic Multi Option Active - Risk Grade 1
Parmenion Strategic Multi Option Active	4	Parmenion Strategic Multi Option Active - Risk Grade 2
Parmenion Strategic Multi Option Active	4	Parmenion Strategic Multi Option Active - Risk Grade 3
Parmenion Strategic Multi Option Active	4	Parmenion Strategic Multi Option Active - Risk Grade 4
Parmenion Strategic Multi Option Active	4	Parmenion Strategic Multi Option Active - Risk Grade 5
Parmenion Strategic Multi Option Active	4	Parmenion Strategic Multi Option Active - Risk Grade 6
Parmenion Strategic Multi Option Active	4	Parmenion Strategic Multi Option Active - Risk Grade 7
Parmenion Strategic Multi Option Active	4	Parmenion Strategic Multi Option Active - Risk Grade 8
Parmenion Strategic Multi Option Active	4	Parmenion Strategic Multi Option Active - Risk Grade 9
Parmenion Strategic Multi Option Active	4	Parmenion Strategic Multi Option Active - Risk Grade 10
Premier MPS Income	4	Premier Miton Income & Growth Portfolio
Premier MPS Income	4	Premier Miton Income Portfolio
Premier MPS Income	4	Premier Miton High Income Portfolio
Quilter Cheviot MPS IDX	4	Quilter Cheviot IDX Conservative
Quilter Cheviot MPS IDX	4	Quilter Cheviot IDX Income
Quilter Cheviot MPS IDX	4	Quilter Cheviot IDX Balanced
Quilter Cheviot MPS IDX	4	Quilter Cheviot IDX Growth
VAM MPS	4	VAM Cautious
VAM MPS	4	VAM Cautious Balanced
VAM MPS	4	VAM Balanced
VAM MPS	4	VAM Balanced Growth



Family name	Diamond Rating	Fund name
VAM MPS	4	VAM Growth
Voyager Global	4	Voyager Global 2 - Conservative
Voyager Global	4	Voyager Global 3 - Income
Voyager Global	4	Voyager Global 4 - Balanced
Voyager Global	4	Voyager Global 5 - Growth
Voyager Income	4	Voyager Conservative Higher Income
Voyager Income	4	Voyager Income
Voyager Income	4	Voyager Higher Income
Voyager MPS	4	Voyager Conservative
Voyager MPS	4	Voyager Balanced
Voyager MPS	4	Voyager Growth
Wealthify Original	4	Wealthify Original Cautious
Wealthify Original	4	Wealthify Original Tentative
Wealthify Original	4	Wealthify Original Confident
Wealthify Original	4	Wealthify Original Ambitious
Wealthify Original	4	Wealthify Original Adventurous
Whitechurch Prestige Capital Growth	4	Whitechurch Prestige Capital Growth 3
Whitechurch Prestige Capital Growth	4	Whitechurch Prestige Capital Growth 4
Whitechurch Prestige Capital Growth	4	Whitechurch Prestige Capital Growth 5
Whitechurch Prestige Capital Growth	4	Whitechurch Prestige Capital Growth 6
Whitechurch Prestige Capital Growth	4	Whitechurch Prestige Capital Growth 7
Whitechurch Prestige Capital Growth	4	Whitechurch Prestige Aggressive Growth
Whitechurch Prestige Ethical Income & Growth	4	Whitechurch Prestige Ethical Income and Growth 4
Whitechurch Prestige Ethical Income & Growth	4	Whitechurch Prestige Ethical Income and Growth 5
Whitechurch Prestige Ethical Income & Growth	4	Whitechurch Prestige Ethical Income and Growth 6



Family name	Diamond Rating	Fund name
Whitechurch Prestige Ethical Income & Growth	4	Whitechurch Prestige Ethical Income and Growth 7
Whitechurch Prestige Income & Growth	4	Whitechurch Prestige Income and Growth 3
Whitechurch Prestige Income & Growth	4	Whitechurch Prestige Income and Growth 4
Whitechurch Prestige Income & Growth	4	Whitechurch Prestige Income and Growth 5
Whitechurch Prestige Income & Growth	4	Whitechurch Prestige Income and Growth 6
Whitechurch Prestige Income & Growth	4	Whitechurch Prestige Income and Growth 7
abrdn Sustainable Index	3	abrdn Sustainable Index MPS 1
abrdn Sustainable Index	3	abrdn Sustainable Index MPS 2
abrdn Sustainable Index	3	abrdn Sustainable Index MPS 3
abrdn Sustainable Index	3	abrdn Sustainable Index MPS 4
abrdn Sustainable Index	3	abrdn Sustainable Index MPS 5
AJ Bell Responsible	3	AJ Bell Responsible MPS 1
AJ Bell Responsible	3	AJ Bell Responsible MPS 2
AJ Bell Responsible	3	AJ Bell Responsible MPS 3
AJ Bell Responsible	3	AJ Bell Responsible MPS 4
AJ Bell Responsible	3	AJ Bell Responsible MPS 5
AJ Bell Responsible	3	AJ Bell Responsible MPS 6
Albert E Sharp ESG Models	3	Albert E Sharp ESG Model 2
Albert E Sharp ESG Models	3	Albert E Sharp ESG Model 3
Albert E Sharp ESG Models	3	Albert E Sharp ESG Model 4
Albert E Sharp ESG Models	3	Albert E Sharp ESG Model 5
Albert E Sharp ESG Models	3	Albert E Sharp ESG Model 6
Albert E Sharp ESG Models	3	Albert E Sharp ESG Model 7
Albert E Sharp ESG Models	3	Albert E Sharp ESG Model 8
Albert E Sharp ESG Models	3	Albert E Sharp ESG Model 10
Arbuthnot Sustainable MPS	3	Arbuthnot Sustainable Portfolio Service Portfolio 1





Family name	Diamond Rating	Fund name
Arbuthnot Sustainable MPS	3	Arbuthnot Sustainable Portfolio Service Portfolio 2
Arbuthnot Sustainable MPS	3	Arbuthnot Sustainable Portfolio Service Portfolio 3
Arbuthnot Sustainable MPS	3	Arbuthnot Sustainable Portfolio Service Portfolio 4
Arbuthnot Sustainable MPS	3	Arbuthnot Sustainable Portfolio Service Portfolio 5
Arbuthnot Sustainable MPS	3	Arbuthnot Sustainable Portfolio Service Portfolio 6
BMAM MPS Responsible Investment Advance	3	Brooks Macdonald MPS Responsible Investment Advance Low to Medium Risk
BMAM MPS Responsible Investment Advance	3	Brooks Macdonald MPS Responsible Investment Advance Medium Risk
BMAM MPS Responsible Investment Advance	3	Brooks Macdonald MPS Responsible Investment Advance Medium to High Risk
Copia Retirement Income	3	Copia Retirement Income 1
Copia Retirement Income	3	Copia Retirement Income 2
Copia Retirement Income	3	Copia Retirement Income 3
Copia Retirement Income	3	Copia Retirement Income 4
Copia Retirement Income	3	Copia Retirement Income 5
Copia Retirement Income Plus	3	Copia Retirement Income Plus 1
Copia Retirement Income Plus	3	Copia Retirement Income Plus 2
Copia Retirement Income Plus	3	Copia Retirement Income Plus 3
Copia Retirement Income Plus	3	Copia Retirement Income Plus 4
Copia Retirement Income Plus	3	Copia Retirement Income Plus 5
Copia Select Blended	3	Copia Select Blended Cautious
Copia Select Blended	3	Copia Select Blended Moderate
Copia Select Blended	3	Copia Select Blended Balanced
Copia Select Blended	3	Copia Select Blended Growth



Family name	Diamond Rating	Fund name
Copia Select Blended	3	Copia Select Blended Equity
Copia Select ESG	3	Copia Select ESG Cautious
Copia Select ESG	3	Copia Select ESG Moderate
Copia Select ESG	3	Copia Select ESG Balanced
Copia Select ESG	3	Copia Select ESG Growth
Copia Select ESG	3	Copia Select ESG Equity
Credo ESG	3	Credo MAP ESG 20/80
Credo ESG	3	Credo MAP ESG 45/55
Credo ESG	3	Credo MAP ESG 60/40
Credo ESG	3	Credo MAP ESG 70/30
Fundment Ethical	3	Fundment Ethical 20% Equity
Fundment Ethical	3	Fundment Ethical 50% Equity
Fundment Ethical	3	Fundment Ethical 60% Equity
Fundment Ethical	3	Fundment Ethical 80% Equity
Fundment Ethical	3	Fundment Ethical 100% Equity
Netwealth MPS	3	Netwealth MPS I
Netwealth MPS	3	Netwealth MPS II
Netwealth MPS	3	Netwealth MPS III
Netwealth MPS	3	Netwealth MPS IV
Netwealth MPS	3	Netwealth MPS V
Netwealth MPS	3	Netwealth MPS VI
Netwealth MPS	3	Netwealth MPS VII
O-IM MPS	3	O-IM Low Risk Portfolio
O-IM MPS	3	O-IM Medium-Low Risk Portfolio
O-IM MPS	3	O-IM Medium Risk Portfolio
O-IM MPS	3	O-IM Medium-High Risk Portfolio
O-IM MPS	3	O-IM High Risk Portfolio
O-IM MPS	3	O-IM Global Equities Portfolio
P1 MPS	3	P1 Protective



Family name	Diamond Rating	Fund name
P1 MPS	3	P1 Lower Risk Growth
P1 MPS	3	P1 Growth Focus
P1 MPS	3	P1 Growth Seeker
P1 MPS	3	P1 Adventurous
P1 MPS Ethical	3	P1 Ethical Lower Risk
P1 MPS Ethical	3	P1 Ethical Temperate
P1 MPS Ethical	3	P1 Ethical Growth
P1 MPS Ethical	3	P1 Ethical Adventurous
P1 MPS Responsible Asset Tracker	3	P1 Responsible Asset Tracker Cautious
P1 MPS Responsible Asset Tracker	3	P1 Responsible Asset Tracker Cautious Moderate
P1 MPS Responsible Asset Tracker	3	P1 Responsible Asset Tracker Moderate
P1 MPS Responsible Asset Tracker	3	P1 Responsible Asset Tracker Moderate Adventurous
P1 MPS Responsible Asset Tracker	3	P1 Responsible Asset Tracker Adventurous
Parmenion Strategic Passive ESG	3	Parmenion Strategic Passive ESG - Risk Grade 1
Parmenion Strategic Passive ESG	3	Parmenion Strategic Passive ESG - Risk Grade 2
Parmenion Strategic Passive ESG	3	Parmenion Strategic Passive ESG - Risk Grade 3
Parmenion Strategic Passive ESG	3	Parmenion Strategic Passive ESG - Risk Grade 4
Parmenion Strategic Passive ESG	3	Parmenion Strategic Passive ESG - Risk Grade 5
Parmenion Strategic Passive ESG	3	Parmenion Strategic Passive ESG - Risk Grade 6
Parmenion Strategic Passive ESG	3	Parmenion Strategic Passive ESG - Risk Grade 7
Parmenion Strategic Passive ESG	3	Parmenion Strategic Passive ESG - Risk Grade 8
Parmenion Strategic Passive ESG	3	Parmenion Strategic Passive ESG - Risk Grade 9



Family name	Diamond Rating	Fund name
Parmenion Strategic Passive ESG	3	Parmenion Strategic Passive ESG - Risk Grade 10
Rathbones Greenbank MPS	3	Rathbone Greenbank Strategy 2
Rathbones Greenbank MPS	3	Rathbone Greenbank Strategy 3
Rathbones Greenbank MPS	3	Rathbone Greenbank Strategy 4
Rathbones Greenbank MPS	3	Rathbone Greenbank Strategy 5
Walker Crips MPS Collectives	3	Walker Crips MPS Collectives Defensive Income
Walker Crips MPS Collectives	3	Walker Crips MPS Collectives Conservative
Walker Crips MPS Collectives	3	Walker Crips MPS Collectives Conservative Income
Walker Crips MPS Collectives	3	Walker Crips MPS Collectives Balanced
Walker Crips MPS Collectives	3	Walker Crips MPS Collectives Moderate
Walker Crips MPS Collectives	3	Walker Crips MPS Collectives Growth
Walker Crips MPS Collectives	3	Walker Crips MPS Collectives Global Growth
Wealthify Ethical	3	Wealthify Ethical Cautious
Wealthify Ethical	3	Wealthify Ethical Tentative
Wealthify Ethical	3	Wealthify Ethical Confident
Wealthify Ethical	3	Wealthify Ethical Ambitious
Wealthify Ethical	3	Wealthify Ethical Adventurous
Whitechurch PMS Responsible Dynamic	3	Whitechurch PMS Responsible Dynamic Defensive
Whitechurch PMS Responsible Dynamic	3	Whitechurch PMS Responsible Dynamic Cautious
Whitechurch PMS Responsible Dynamic	3	Whitechurch PMS Responsible Dynamic Balanced
Whitechurch PMS Responsible Dynamic	3	Whitechurch PMS Responsible Dynamic Steady Growth
Whitechurch PMS Responsible Dynamic	3	Whitechurch PMS Responsible Dynamic Growth
Whitechurch Prestige Income	3	Whitechurch Prestige Income 3
Whitechurch Prestige Income	3	Whitechurch Prestige Income 4



Family name	Diamond Rating	Fund name
Whitechurch Prestige Income	3	Whitechurch Prestige Income 5
Whitechurch Prestige Income	3	Whitechurch Prestige Income 6
abrDn Sustainable	2	abrDn Sustainable MPS 1
abrDn Sustainable	2	abrDn Sustainable MPS 2
abrDn Sustainable	2	abrDn Sustainable MPS 3
abrDn Sustainable	2	abrDn Sustainable MPS 4
abrDn Sustainable	2	abrDn Sustainable MPS 5
GHC DCS Plus	2	GHC DCS Plus RG3
GHC DCS Plus	2	GHC DCS Plus RG4
GHC DCS Plus	2	GHC DCS Plus RG5
GHC DCS Plus	2	GHC DCS Plus RG6
GHC DCS Plus	2	GHC DCS Plus RG7
GHC DCS Plus	2	GHC DCS Plus RG8
GHC OPS	2	GHC OPS RG2
GHC OPS	2	GHC OPS RG3
GHC OPS	2	GHC OPS RG4
GHC OPS	2	GHC OPS RG5
GHC OPS	2	GHC OPS RG6
GHC OPS	2	GHC OPS RG7
GHC OPS	2	GHC OPS RG8
James Brearley ESG	2	James Brearley ESG Conservative
James Brearley ESG	2	James Brearley ESG Defensive
James Brearley ESG	2	James Brearley ESG Cautious
James Brearley ESG	2	James Brearley ESG Balanced
James Brearley ESG	2	James Brearley ESG Dynamic
Octopus OPM	2	Octopus OPM 1/Cash
Octopus OPM	2	Octopus OPM 2/Cash Plus
Octopus OPM	2	Octopus OPM 3/Defensive Capital Growth



Family name	Diamond Rating	Fund name
Octopus OPM	2	Octopus OPM 4/Conservative Capital Growth
Octopus OPM	2	Octopus OPM 5/Moderate Capital Growth
Octopus OPM	2	Octopus OPM 6/Progressive Capital Growth
Octopus OPM	2	Octopus OPM 7/Managed Equity Growth
Octopus OPM	2	Octopus OPM 8/Advanced Equity Growth
Octopus OPM	2	Octopus OPM 9/Global Equity Opportunities
Octopus OPM	2	Octopus OPM 10/International Equity Focus
RC Brown Conventional	2	RC Brown Defensive Portfolio (Conventional)
RC Brown Conventional	2	RC Brown Conservative Portfolio (Conventional)
RC Brown Conventional	2	RC Brown Cautious Portfolio (Conventional)
RC Brown Conventional	2	RC Brown Cautious Balanced Portfolio (Conventional)
RC Brown Conventional	2	RC Brown Balanced Portfolio (Conventional)
RC Brown Conventional	2	RC Brown Balanced Growth Portfolio (Conventional)
RC Brown Conventional	2	RC Brown Growth Portfolio (Conventional)
RC Brown Performance	2	RC Brown Defensive Portfolio (Performance)
RC Brown Performance	2	RC Brown Conservative Portfolio (Performance)
RC Brown Performance	2	RC Brown Cautious Portfolio (Performance)
RC Brown Performance	2	RC Brown Caut Balanced Pfolio (Performance)
RC Brown Performance	2	RC Brown Balanced Portfolio (Performance)
RC Brown Performance	2	RC Brown Balanced Growth Portfolio (Performance)
RC Brown Performance	2	RC Brown Growth Portfolio (Performance)
RC Brown Portcullis Conventional	2	RC Brown Portcullis Defensive Portfolio (Conventional)
RC Brown Portcullis Conventional	2	RC Brown Portcullis Conservative Portfolio (Conventional)
RC Brown Portcullis Conventional	2	RC Brown Portcullis Cautious Portfolio (Conventional)
RC Brown Portcullis Conventional	2	RC Brown Portcullis Cautious Balanced Portfolio (Conventional)



Family name	Diamond Rating	Fund name
RC Brown Portcullis Conventional	2	RC Brown Portcullis Balanced Portfolio (Conventional)
RC Brown Portcullis Conventional	2	RC Brown Portcullis Balanced Growth Portfolio (Conventional)
RC Brown Portcullis Conventional	2	RC Brown Portcullis Growth Portfolio (Conventional)
RC Brown Portcullis Performance	2	RC Brown Portcullis Defensive Portfolio (Performance)
RC Brown Portcullis Performance	2	RC Brown Portcullis Conservative Portfolio (Performance)
RC Brown Portcullis Performance	2	RC Brown Portcullis Cautious Portfolio (Performance)
RC Brown Portcullis Performance	2	RC Brown Portcullis Cautious Balanced Portfolio (Performance)
RC Brown Portcullis Performance	2	RC Brown Portcullis Balanced Portfolio (Performance)
RC Brown Portcullis Performance	2	RC Brown Portcullis Balanced Growth Portfolio (Performance)
RC Brown Portcullis Performance	2	RC Brown Portcullis Growth Portfolio (Performance)
MitonOptimal MMPS	1	MitonOptimal MMPS 2
MitonOptimal MMPS	1	MitonOptimal MMPS 3
MitonOptimal MMPS	1	MitonOptimal MMPS 4
MitonOptimal MMPS	1	MitonOptimal MMPS 5
MitonOptimal MMPS	1	MitonOptimal MMPS 6
Progeny	1	Progeny DT3
Progeny	1	Progeny DT4
Progeny	1	Progeny DT5
Progeny	1	Progeny DT6
Progeny	1	Progeny DT7
RD Intermediaries	1	RD Intermediaries Defensive
RD Intermediaries	1	RD Intermediaries Balanced
RD Intermediaries	1	RD Intermediaries Growth



Family name	Diamond Rating	Fund name
RD Intermediaries	1	RD Intermediaries Adventurous
Tacit MPS	1	Tacit Conservative
Tacit MPS	1	Tacit Real Return
Tacit MPS	1	Tacit Steady Growth
Tacit MPS	1	Tacit Total Return