

defaqto mps comparator

Investment report - MPS Platform

5 year cumulative performance to the end of April 2026

Rank	Fund name	Defaqto MPS Comparator	Stock Selection	5 Yr Cum. Return	5 Yr Volatility	5 Yr Quartile	Total Cost
1	EPIC MPS Risk Targeted Managed 3	Defensive	Active	45.84%	5.73	Top	0.67%
2	Quilter WealthSelect Managed Blend 5	Defensive	Active	30.68%	6.15	Top	0.74%
3	Rivers Cautious Portfolio	Defensive	Active	30.31%	5.28	Top	0.93%
4	Collidr Select Active 4	Defensive	Active	30.18%	5.96	Top	0.79%
5	Collidr Select Income 5	Defensive	Active	30.14%	5.75	Top	0.84%
6	Ascencia Safety First 5	Defensive	Active	29.92%	5.62	Top	1.03%
7	Sparrows Capital SCORE Market Equity 40 (Index funds only)	Defensive	Passive	29.65%	5.65	Top	0.24%
8	Collidr Select Hybrid 4	Defensive	Active	29.62%	5.67	Top	0.64%
9	Quilter WealthSelect Managed Active 5	Defensive	Active	29.12%	6.03	Top	0.89%
10	Evelyn Partners Core Conservative	Defensive	Active	27.98%	5.42	Top	0.62%
11	IBOSS Decumulation Portfolio 2	Defensive	Active	27.74%	6.13	Top	0.80%
12	Ascencia Safety First 4	Defensive	Active	27.27%	4.95	Top	0.99%
13	Sparrows Capital SCORE Factor Equity 50 (Index funds & ETFs)	Defensive	Passive	27.07%	5.99	Top	0.35%
14	Titan Square Mile Income	Defensive	Active	26.67%	5.90	Top	0.95%
15	Collidr Select Enhanced Index 4	Defensive	Active	26.39%	6.10	Top	0.37%
16	Collidr Select Income 4	Defensive	Active	25.81%	5.19	Top	0.83%
17	AJ Bell Pactive MPS 2	Defensive	Active	25.57%	6.09	Top	0.63%
18	Brooks Macdonald Low to Medium Risk (Income)	Defensive	Active	25.13%	5.77	Top	0.71%
19	Collidr Select Active 3	Defensive	Active	25.06%	4.95	Top	0.80%
20	OFNPM Cautious (Passive)	Defensive	Passive	24.92%	4.92	Top	0.28%
	#1: Defaqto MPS Comparator Defensive	Defensive		12.95%	4.82		0.55%
	#1: Defaqto MPS Comparator Defensive (Active)	Defensive	Active	14.69%	4.71		0.66%
	#1: Defaqto MPS Comparator Defensive (Passive)	Defensive	Passive	11.40%	4.83		0.31%

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1	TEAM Multi-Asset Conservative Portfolio	Cautious	Passive	47.99%	6.94	Top	0.92%
2	Ascencia Portfolio of Sharia Compliant Solutions 4	Cautious	Active	45.65%	6.58	Top	1.19%
3	Tatton Income Balanced	Cautious	Active	41.18%	6.89	Top	0.90%
4	Quilter WealthSelect Managed Active 7	Cautious	Active	40.93%	7.55	Top	1.00%
5	AJ Bell Passive MPS 3	Cautious	Passive	40.39%	6.93	Top	0.30%
6	Collidr Select Income 7	Cautious	Active	39.10%	6.92	Top	0.87%
7	Rivers Balanced Portfolio	Cautious	Active	37.94%	6.97	Top	0.99%
8	Brooks Macdonald Medium Risk (Income)	Cautious	Active	37.92%	6.87	Top	0.79%
9	Quilter WealthSelect Managed Blend 6	Cautious	Active	37.72%	6.91	Top	0.73%
10	AJ Bell Passive MPS Income 1	Cautious	Passive	37.67%	6.81	Top	0.39%
11	AJ Bell Active MPS 3	Cautious	Active	37.59%	6.96	Top	0.76%
12	AJ Bell Pactive MPS 3	Cautious	Active	36.93%	6.87	Top	0.67%
13	VAM VIP Balanced Income	Cautious	Active	36.60%	7.15	Top	0.93%
14	OFNPM Balanced (Passive)	Cautious	Passive	36.03%	6.72	Top	0.27%
15	Evelyn Partners Core Balanced	Cautious	Active	35.39%	6.93	Top	0.68%
16	Collidr Select Active 5	Cautious	Active	35.36%	6.98	Top	0.76%
17	Binary Islamic Cautious	Cautious	Active	35.30%	6.72	Top	0.89%
18	Quilter WealthSelect Managed Active 6	Cautious	Active	35.04%	6.77	Top	0.94%
19	AJ Bell Active MPS Income 1	Cautious	Active	34.76%	7.04	Top	0.74%
20	Drumnor Investments Steady Model Portfolio	Cautious	Active	34.76%	7.19	Top	0.62%
	#2: Defaqto MPS Comparator Cautious	Cautious		21.41%	6.43		0.61%
	#2: Defaqto MPS Comparator Cautious (Active)	Cautious	Active	21.29%	6.39		0.71%
	#2: Defaqto MPS Comparator Cautious (Passive)	Cautious	Passive	24.15%	6.41		0.34%

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Rank	Fund name	Defaqto MPS Comparator	Stock Selection	5 Yr Cum. Return	5 Yr Volatility	5 Yr Quartile	Total Cost
1	EPIC MPS Risk Targeted Managed 5	Balanced	Active	59.94%	8.33	Top	0.80%
2	Ascencia Portfolio of Sharia Compliant Solutions 5	Balanced	Active	55.19%	7.88	Top	1.11%
3	Tatton Income Active	Balanced	Active	54.37%	7.78	Top	1.01%
4	Quilter WealthSelect Managed Blend 8	Balanced	Active	51.05%	8.59	Top	0.73%
5	AJ Bell Passive MPS 4	Balanced	Passive	50.98%	8.02	Top	0.30%
6	Fundhouse Responsible Global Growth	Balanced	Active	50.24%	8.34	Top	0.81%
7	Voyager Growth (Direct Equity)	Balanced	Active	49.94%	7.71	Top	1.12%
8	Morningstar Moderately Adventurous Passive Portfolio	Balanced	Passive	48.86%	8.15	Top	0.36%
9	Collidr Select Income 9	Balanced	Active	48.43%	8.12	Top	0.90%
10	Binary Islamic Balanced	Balanced	Active	48.08%	8.56	Top	0.83%
11	Quilter WealthSelect Managed Active 8	Balanced	Active	46.94%	8.41	Top	1.02%
12	OFNPM Growth (Passive)	Balanced	Passive	46.33%	8.21	Top	0.28%
13	Fundhouse Global Growth	Balanced	Active	46.19%	7.70	Top	0.78%
14	Tatton Classic Tracker Active	Balanced	Passive	46.15%	8.35	Top	0.38%
15	Parmenion Passive Growth - Risk Grade 7	Balanced	Passive	45.90%	8.13	Top	0.43%
16	Parmenion Income - Risk Grade 8	Balanced	Active	45.90%	8.55	Top	1.01%
17	Aspen Growth Core Portfolio	Balanced	Active	45.83%	8.30	Top	0.68%
18	Collidr Select Hybrid 7	Balanced	Active	45.54%	8.54	Top	0.50%
19	Drumnor Investments Moderate Model Portfolio	Balanced	Active	45.39%	8.05	Top	0.63%
20	AJ Bell Pactive MPS 4	Balanced	Active	45.18%	7.99	Top	0.73%
	#3: Defaqto MPS Comparator Balanced	Balanced		27.57%	7.67		0.66%
	#3: Defaqto MPS Comparator Balanced (Active)	Balanced	Active	27.02%	7.59		0.77%
	#3: Defaqto MPS Comparator Balanced (Passive)	Balanced	Passive	33.05%	7.59		0.31%

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Rank	Fund name	Defaqto MPS Comparator	Stock Selection	5 Yr Cum. Return	5 Yr Volatility	5 Yr Quartile	Total Cost
1	EPIC MPS Risk Targeted Managed 7	Growth	Active	74.57%	9.47	Top	0.85%
2	Tatton Income Aggressive	Growth	Active	64.45%	8.47	Top	1.07%
3	AJ Bell Passive MPS 5	Growth	Passive	64.31%	8.84	Top	0.29%
4	Parmenion Passive Growth (Risk Managed) - Risk Grade 7	Growth	Passive	63.68%	10.42	Top	0.72%
5	Aberdeen Index MPS 5	Growth	Passive	62.68%	9.44	Top	0.21%
6	TEAM Multi-Asset Growth Portfolio	Growth	Passive	61.14%	9.63	Top	0.96%
7	Ascencia Portfolio of Sharia Compliant Solutions 6	Growth	Active	60.68%	9.19	Top	1.06%
8	AJ Bell Passive MPS 6	Growth	Passive	60.44%	9.73	Top	0.28%
9	Fundhouse Global Equity	Growth	Active	58.72%	8.96	Top	0.87%
10	Morningstar Governed Portfolio Adventurous Growth	Growth	Active	58.63%	9.35	Top	0.56%
11	Morningstar Blended Adventurous Portfolio	Growth	Active	58.23%	9.35	Top	0.61%
12	Morningstar Adventurous Passive Portfolio	Growth	Passive	58.22%	9.10	Top	0.37%
13	Parmenion Passive Growth - Risk Grade 9	Growth	Passive	57.99%	9.68	Top	0.39%
14	Pacific Global Aggressive Efficient Portfolio	Growth	Active	57.87%	9.56	Top	0.61%
15	Aspen Equity Focus Passive Plus Portfolio	Growth	Passive	57.17%	9.70	Top	0.37%
16	AJ Bell Pactive MPS 5	Growth	Active	56.05%	8.85	Top	0.76%
17	Aspen Equity Focus Core Portfolio	Growth	Active	55.85%	9.55	Top	0.69%
18	Pacific Aggressive Global Portfolio	Growth	Active	55.39%	9.20	Top	0.72%
19	Sparrows Capital SCore Market Equity 80 (Index funds only)	Growth	Passive	54.96%	9.32	Top	0.23%
20	Pacific Aggressive Portfolio	Growth	Active	54.63%	8.89	Top	0.71%
	#4: Defaqto MPS Comparator Growth	Growth		34.30%	8.75		0.66%
	#4: Defaqto MPS Comparator Growth (Active)	Growth	Active	30.51%	8.71		0.80%
	#4: Defaqto MPS Comparator Growth (Passive)	Growth	Passive	44.16%	8.64		0.34%

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1	Quorum Capital Aggressive Portfolio (RG5aUK)	Adventurous	Active	76.39%	13.13	Top	0.91%
2	Timeline 0.09% Tracker - 100	Adventurous	Passive	72.87%	11.21	Top	0.21%
3	Timeline 0.15% Tracker - 100	Adventurous	Passive	72.52%	11.21	Top	0.27%
4	Binary Islamic Adventurous	Adventurous	Active	71.79%	12.52	Top	0.69%
5	Quorum Capital Adventurous Portfolio (RG4aUK)	Adventurous	Active	71.23%	12.52	Top	0.83%
6	Sparrows Capital SCORE Market Equity 100 (Index funds only)	Adventurous	Passive	67.36%	11.00	Top	0.24%
7	Pacific Aggressive Passive Portfolio	Adventurous	Passive	65.93%	10.19	Top	0.25%
8	Saltus Global Markets - Adventurous	Adventurous	Passive	65.86%	11.02	Top	0.55%
9	Morningstar International GBP Adventurous Growth	Adventurous	Active	65.54%	9.39	Top	0.56%
10	Timeline 0.09% Tracker - 90	Adventurous	Passive	64.86%	10.49	Top	0.20%
11	Timeline 0.15% Tracker - 90	Adventurous	Passive	64.52%	10.49	Top	0.26%
12	Parmenion Vanguard LifeStrategy Portfolio 10	Adventurous	Passive	63.87%	10.40	Top	0.29%
13	Tatton Global Tracker Equity	Adventurous	Passive	63.56%	10.95	Top	0.28%
14	Quorum Capital Balanced Portfolio (RG3aUK)	Adventurous	Active	63.24%	11.02	Top	0.78%
15	Collidr Select Active 10	Adventurous	Active	63.10%	12.11	Top	0.66%
16	Collidr Select Hybrid 10	Adventurous	Active	62.89%	11.42	Top	0.35%
17	Parmenion Passive Growth - Risk Grade 10	Adventurous	Passive	62.73%	10.63	Top	0.32%
18	Collidr Select Enhanced Index 10	Adventurous	Active	62.48%	11.44	Top	0.32%
19	Tatton Global Core Equity	Adventurous	Active	61.91%	10.94	Top	0.60%
20	Collidr Select Strategic Index 10	Adventurous	Active	61.78%	11.71	Top	0.22%
	#5: Defaqto MPS Comparator Adventurous	Adventurous		35.82%	10.16		0.67%
	#5: Defaqto MPS Comparator Adventurous (Active)	Adventurous	Active	31.42%	10.21		0.83%
	#5: Defaqto MPS Comparator Adventurous (Passive)	Adventurous	Passive	50.44%	10.14		0.34%

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