



## DFM MPS (Direct) 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 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 Pathway	5	7IM Pathway 1 Model Portfolio
7IM Pathway	5	7IM Pathway 2 Model Portfolio
7IM Pathway	5	7IM Pathway 3 Model Portfolio
7IM Pathway	5	7IM Pathway 4 Model Portfolio
7IM Pathway	5	7IM Pathway 5 Model Portfolio
Aberdeen Standard Capital Conventional	5	ASC Conventional MPS 1
Aberdeen Standard Capital Conventional	5	ASC Conventional MPS 2
Aberdeen Standard Capital Conventional	5	ASC Conventional MPS 3
Aberdeen Standard Capital Conventional	5	ASC Conventional MPS 4
Aberdeen Standard Capital Conventional	5	ASC Conventional MPS 5



Family name	Diamond Rating	Fund name
Aberdeen Standard Capital MyPortfolio Index	5	ASI MyPortfolio Index 1
Aberdeen Standard Capital MyPortfolio Index	5	ASI MyPortfolio Index 2
Aberdeen Standard Capital MyPortfolio Index	5	ASI MyPortfolio Index 3
Aberdeen Standard Capital MyPortfolio Index	5	ASI MyPortfolio Index 4
Aberdeen Standard Capital MyPortfolio Index	5	ASI MyPortfolio Index 5
Aberdeen Standard Capital MyPortfolio Index Plus	5	ASI MyPortfolio Index Plus 1
Aberdeen Standard Capital MyPortfolio Index Plus	5	ASI MyPortfolio Index Plus 2
Aberdeen Standard Capital MyPortfolio Index Plus	5	ASI MyPortfolio Index Plus 3
Aberdeen Standard Capital MyPortfolio Index Plus	5	ASI MyPortfolio Index Plus 4
Aberdeen Standard Capital MyPortfolio Index Plus	5	ASI MyPortfolio Index Plus 5
Aberdeen Standard Capital MyPortfolio Select	5	ASI MyPortfolio Select 1
Aberdeen Standard Capital MyPortfolio Select	5	ASI MyPortfolio Select 2
Aberdeen Standard Capital MyPortfolio Select	5	ASI MyPortfolio Select 3
Aberdeen Standard Capital MyPortfolio Select	5	ASI MyPortfolio Select 4
Aberdeen Standard Capital MyPortfolio Select	5	ASI MyPortfolio Select 5
AJ Bell Passive	5	AJ Bell Passive MPS Portfolio 1
AJ Bell Passive	5	AJ Bell Passive MPS Portfolio 2



Family name	Diamond Rating	Fund name
AJ Bell Passive	5	AJ Bell Passive MPS Portfolio 3
AJ Bell Passive	5	AJ Bell Passive MPS Portfolio 4
AJ Bell Passive	5	AJ Bell Passive MPS Portfolio 5
AJ Bell Passive	5	AJ Bell Passive MPS Portfolio 6
Albert E Sharp RR Models	5	Albert E Sharp Model 1-2
Albert E Sharp RR Models	5	Albert E Sharp Model 2
Albert E Sharp RR Models	5	Albert E Sharp Model 3
Albert E Sharp RR Models	5	Albert E Sharp Model 4
Albert E Sharp RR Models	5	Albert E Sharp Model 5
Albert E Sharp RR Models	5	Albert E Sharp Model 6
Albert E Sharp RR Models	5	Albert E Sharp Model 7
Albert E Sharp RR Models	5	Albert E Sharp Model 8
Albert E Sharp RR Models	5	Albert E Sharp Model 10
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 MPS	5	Bordier Defensive
Bordier MPS	5	Bordier Cautious
Bordier MPS	5	Bordier Balanced
Bordier MPS	5	Bordier Growth
Bordier MPS	5	Bordier Adventurous



Family name	Diamond Rating	Fund name
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
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
LGT Vestra MPS	5	LGT Vestra Defensive
LGT Vestra MPS	5	LGT Vestra Cautious
LGT Vestra MPS	5	LGT Vestra Balanced
LGT Vestra MPS	5	LGT Vestra Growth
LGT Vestra MPS	5	LGT Vestra Adventurous
Liontrust WSS Dynamic Beta	5	Liontrust WSS Dynamic Beta 1
Liontrust WSS Dynamic Beta	5	Liontrust WSS Dynamic Beta 2
Liontrust WSS Dynamic Beta	5	Liontrust WSS Dynamic Beta 3
Liontrust WSS Dynamic Beta	5	Liontrust WSS Dynamic Beta 4
Liontrust WSS Dynamic Beta	5	Liontrust WSS Dynamic Beta 5
Liontrust WSS Dynamic Beta	5	Liontrust WSS Dynamic Beta 6
Liontrust WSS Dynamic Beta	5	Liontrust WSS Dynamic Beta 7



Family name	Diamond Rating	Fund name
Liontrust WSS Dynamic Beta	5	Liontrust WSS Dynamic Beta 8
Liontrust WSS Dynamic Beta	5	Liontrust WSS Dynamic Beta 9
Liontrust WSS Dynamic Beta	5	Liontrust WSS Dynamic Beta 10
Liontrust WSS Growth	5	Liontrust WSS Growth 1
Liontrust WSS Growth	5	Liontrust WSS Growth 2
Liontrust WSS Growth	5	Liontrust WSS Growth 3
Liontrust WSS Growth	5	Liontrust WSS Growth 4
Liontrust WSS Growth	5	Liontrust WSS Growth 5
Liontrust WSS Growth	5	Liontrust WSS Growth 6
Liontrust WSS Growth	5	Liontrust WSS Growth 7
Liontrust WSS Growth	5	Liontrust WSS Growth 8
Liontrust WSS Growth	5	Liontrust WSS Growth 9
Liontrust WSS Growth	5	Liontrust WSS Growth 10
Liontrust WSS Income	5	Liontrust WSS Income 1
Liontrust WSS Income	5	Liontrust WSS Income 2
Liontrust WSS Income	5	Liontrust WSS Income 3
Liontrust WSS Income	5	Liontrust WSS Income 4
Liontrust WSS Income	5	Liontrust WSS Income 5
Liontrust WSS Income	5	Liontrust WSS Income 6
Nutmeg Fully Managed	5	Nutmeg Fully Managed Portfolio 1
Nutmeg Fully Managed	5	Nutmeg Fully Managed Portfolio 2
Nutmeg Fully Managed	5	Nutmeg Fully Managed Portfolio 3
Nutmeg Fully Managed	5	Nutmeg Fully Managed Portfolio 4
Nutmeg Fully Managed	5	Nutmeg Fully Managed Portfolio 5



Family name	Diamond Rating	Fund name
Nutmeg Fully Managed	5	Nutmeg Fully Managed Portfolio 6
Nutmeg Fully Managed	5	Nutmeg Fully Managed Portfolio 7
Nutmeg Fully Managed	5	Nutmeg Fully Managed Portfolio 8
Nutmeg Fully Managed	5	Nutmeg Fully Managed Portfolio 9
Nutmeg Fully Managed	5	Nutmeg Fully Managed Portfolio 10
OMW Active Managed	5	Old Mutual Wealth WealthSelect 3 Active Managed Portfolio
OMW Active Managed	5	Old Mutual Wealth WealthSelect 4 Active Managed Portfolio
OMW Active Managed	5	Old Mutual Wealth WealthSelect 5 Active Managed Portfolio
OMW Active Managed	5	Old Mutual Wealth WealthSelect 6 Active Managed Portfolio
OMW Active Managed	5	Old Mutual Wealth WealthSelect 7 Active Managed Portfolio
OMW Active Managed	5	Old Mutual Wealth WealthSelect 8 Active Managed Portfolio
OMW Active Managed	5	Old Mutual Wealth WealthSelect 9 Active Managed Portfolio
OMW Active Managed	5	Old Mutual Wealth WealthSelect 10 Active Managed Portfolio
OMW Passive Managed	5	Old Mutual Wealth WealthSelect 3 Blend Managed Portfolio
OMW Passive Managed	5	Old Mutual Wealth WealthSelect 4 Blend Managed Portfolio
OMW Passive Managed	5	Old Mutual Wealth WealthSelect 5 Blend Managed Portfolio
OMW Passive Managed	5	Old Mutual Wealth WealthSelect 6 Blend Managed Portfolio
OMW Passive Managed	5	Old Mutual Wealth WealthSelect 7 Blend Managed Portfolio



Family name	Diamond Rating	Fund name
OMW Passive Managed	5	Old Mutual Wealth WealthSelect 8 Blend Managed Portfolio
OMW Passive Managed	5	Old Mutual Wealth WealthSelect 9 Blend Managed Portfolio
OMW Passive Managed	5	Old Mutual Wealth WealthSelect 10 Blend Managed Portfolio
Parmenion DT Multi Option Active	5	Parmenion Distribution Technology Multi Option Active - Risk Grade 1
Parmenion DT Multi Option Active	5	Parmenion Distribution Technology Multi Option Active - Risk Grade 2
Parmenion DT Multi Option Active	5	Parmenion Distribution Technology Multi Option Active - Risk Grade 3
Parmenion DT Multi Option Active	5	Parmenion Distribution Technology Multi Option Active - Risk Grade 4
Parmenion DT Multi Option Active	5	Parmenion Distribution Technology Multi Option Active - Risk Grade 5
Parmenion DT Multi Option Active	5	Parmenion Distribution Technology Multi Option Active - Risk Grade 6
Parmenion DT Multi Option Active	5	Parmenion Distribution Technology Multi Option Active - Risk Grade 7
Parmenion DT Multi Option Active	5	Parmenion Distribution Technology Multi Option Active - Risk Grade 8
Parmenion DT Multi Option Active	5	Parmenion Distribution Technology Multi Option Active - Risk Grade 9
Parmenion DT Multi Option Active	5	Parmenion Distribution Technology Multi Option Active - Risk Grade 10
Parmenion DT Multi Option Passive	5	Parmenion Distribution Technology Multi Option Passive - Risk Grade 1
Parmenion DT Multi Option Passive	5	Parmenion Distribution Technology Multi Option Passive - Risk Grade 2
Parmenion DT Multi Option Passive	5	Parmenion Distribution Technology Multi Option Passive - Risk Grade 3



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





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



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



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



Family name	Diamond Rating	Fund name
Parmenion Strategic Multi Option Active	5	Parmenion Strategic Multi Option Active - Risk Grade 1
Parmenion Strategic Multi Option Active	5	Parmenion Strategic Multi Option Active - Risk Grade 2
Parmenion Strategic Multi Option Active	5	Parmenion Strategic Multi Option Active - Risk Grade 3
Parmenion Strategic Multi Option Active	5	Parmenion Strategic Multi Option Active - Risk Grade 4
Parmenion Strategic Multi Option Active	5	Parmenion Strategic Multi Option Active - Risk Grade 5
Parmenion Strategic Multi Option Active	5	Parmenion Strategic Multi Option Active - Risk Grade 6
Parmenion Strategic Multi Option Active	5	Parmenion Strategic Multi Option Active - Risk Grade 7
Parmenion Strategic Multi Option Active	5	Parmenion Strategic Multi Option Active - Risk Grade 8
Parmenion Strategic Multi Option Active	5	Parmenion Strategic Multi Option Active - Risk Grade 9
Parmenion Strategic Multi Option Active	5	Parmenion Strategic Multi Option Active - Risk Grade 10
Parmenion Strategic Multi Option Passive	5	Parmenion Strategic Passive - Risk Grade 1
Parmenion Strategic Multi Option Passive	5	Parmenion Strategic Passive - Risk Grade 2
Parmenion Strategic Multi Option Passive	5	Parmenion Strategic Passive - Risk Grade 3
Parmenion Strategic Multi Option Passive	5	Parmenion Strategic Passive - Risk Grade 4
Parmenion Strategic Multi Option Passive	5	Parmenion Strategic Passive - Risk Grade 5
Parmenion Strategic Multi Option Passive	5	Parmenion Strategic Passive - Risk Grade 6



Family name	Diamond Rating	Fund name
Parmenion Strategic Multi Option Passive	5	Parmenion Strategic Passive - Risk Grade 7
Parmenion Strategic Multi Option Passive	5	Parmenion Strategic Passive - Risk Grade 8
Parmenion Strategic Multi Option Passive	5	Parmenion Strategic Passive - Risk Grade 9
Parmenion Strategic Multi Option Passive	5	Parmenion Strategic Passive - Risk Grade 10
Premier MPS	5	Premier Miton Capital Builder Portfolio
Premier MPS	5	Premier Miton Conservative Portfolio
Premier MPS	5	Premier Miton Balanced Portfolio
Premier MPS	5	Premier Miton Growth Portfolio
Premier MPS	5	Premier Miton Dynamic Growth Portfolio
Quilter Cheviot MPS IDX	5	Quilter Cheviot IDX Conservative
Quilter Cheviot MPS IDX	5	Quilter Cheviot IDX Income
Quilter Cheviot MPS IDX	5	Quilter Cheviot IDX Balanced
Quilter Cheviot MPS IDX	5	Quilter Cheviot IDX Growth
Sanlam PW MPS	5	Sanlam Private Wealth Portfolio 2
Sanlam PW MPS	5	Sanlam Private Wealth Portfolio 3
Sanlam PW MPS	5	Sanlam Private Wealth Portfolio 4
Sanlam PW MPS	5	Sanlam Private Wealth Portfolio 5
Sanlam PW MPS	5	Sanlam Private Wealth Portfolio 6
Sanlam PW MPS	5	Sanlam Private Wealth Portfolio 7
Tacit MPS	5	Tacit Conservative
Tacit MPS	5	Tacit Real Return
Tacit MPS	5	Tacit Steady Growth



Family name	Diamond Rating	Fund name
Tacit MPS	5	Tacit Total Return
Tilney MPS	5	Tilney Defensive Portfolio
Tilney MPS	5	Tilney Conservative Portfolio
Tilney MPS	5	Tilney Cautious Portfolio
Tilney MPS	5	Tilney Balanced Portfolio
Tilney MPS	5	Tilney Growth Portfolio
Tilney MPS	5	Tilney Adventurous Portfolio
Tilney MPS	5	Tilney Maximum Growth Portfolio
Tilney SMPS	5	Tilney SMPS Conservative Portfolio
Tilney SMPS	5	Tilney SMPS Cautious Portfolio
Tilney SMPS	5	Tilney SMPS Balanced Portfolio
Tilney SMPS	5	Tilney SMPS Growth Portfolio
Tilney SMPS	5	Tilney SMPS Adventurous Portfolio
Tilney SMPS	5	Tilney SMPS Maximum Growth Portfolio
Wealthify Original	5	Wealthify Original Cautious
Wealthify Original	5	Wealthify Original Tentative
Wealthify Original	5	Wealthify Original Confident
Wealthify Original	5	Wealthify Original Ambitious
Wealthify Original	5	Wealthify Original Adventurous
AFH ATR Standard	4	AFH Wealth ATR 1 - Standard
AFH ATR Standard	4	AFH Wealth ATR 2 - Standard
AFH ATR Standard	4	AFH Wealth ATR 3 - Standard
AFH ATR Standard	4	AFH Wealth ATR 4 - Standard
AFH ATR Standard	4	AFH Wealth ATR 5 - Standard



Family name	Diamond Rating	Fund name
BMAM MPS	4	Brooks Macdonald Low Risk (Defensive Income)
BMAM MPS	4	Brooks Macdonald Low to Medium Risk (Income)
BMAM MPS	4	Brooks Macdonald Low to Medium Risk (Active): (Income & Growth)
BMAM MPS	4	Brooks Macdonald Medium Risk (Income)
BMAM MPS	4	Brooks Macdonald Medium Risk (Active): (Income & Growth)
BMAM MPS	4	Brooks Macdonald Medium to High Risk (Growth)
BMAM MPS	4	Brooks Macdonald High Risk (Growth)
Charles Stanley MM Income	4	Charles Stanley Multi Manager Inc1
Charles Stanley MM Income	4	Charles Stanley Multi Manager Inc2
Charles Stanley MM Income	4	Charles Stanley Multi Manager Inc3
Charles Stanley MM Income	4	Charles Stanley Multi Manager Inc4
Charles Stanley MM Income	4	Charles Stanley Multi Manager Inc5
Close DMS	4	Close DMS Conservative
Close DMS	4	Close DMS Balanced
Close DMS	4	Close DMS Growth
Close MPS	4	Close MPS Conservative
Close MPS	4	Close MPS Balanced
Close MPS	4	Close MPS Growth
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



Family name	Diamond Rating	Fund name
Fusion Wealth Active	4	Fusion Wealth 02 Active Portfolio
Fusion Wealth Active	4	Fusion Wealth 03 Active Portfolio
Fusion Wealth Active	4	Fusion Wealth 04 Active Portfolio
Fusion Wealth Active	4	Fusion Wealth 05 Active Portfolio
Fusion Wealth Active	4	Fusion Wealth 06 Active Portfolio
Fusion Wealth Active	4	Fusion Wealth 07 Active Portfolio
Fusion Wealth Active	4	Fusion Wealth 08 Active Portfolio
Fusion Wealth Active	4	Fusion Wealth 09 Active Portfolio
Fusion Wealth Active	4	Fusion Wealth 10 Active Portfolio
Fusion Wealth Passive	4	Fusion Wealth 02 Passive Portfolio
Fusion Wealth Passive	4	Fusion Wealth 03 Passive Portfolio
Fusion Wealth Passive	4	Fusion Wealth 04 Passive Portfolio
Fusion Wealth Passive	4	Fusion Wealth 05 Passive Portfolio
Fusion Wealth Passive	4	Fusion Wealth 06 Passive Portfolio
Fusion Wealth Passive	4	Fusion Wealth 07 Passive Portfolio
Fusion Wealth Passive	4	Fusion Wealth 08 Passive Portfolio
Fusion Wealth Passive	4	Fusion Wealth 09 Passive Portfolio
Fusion Wealth Passive	4	Fusion Wealth 10 Passive Portfolio
GHC OPS	4	GHC OPS RG2
GHC OPS	4	GHC OPS RG3
GHC OPS	4	GHC OPS RG4
GHC OPS	4	GHC OPS RG5
GHC OPS	4	GHC OPS RG6
GHC OPS	4	GHC OPS RG7





Family name	Diamond Rating	Fund name
GHC OPS	4	GHC OPS RG8
Nutmeg Fixed Allocation	4	Nutmeg Fixed Allocation Portfolio A
Nutmeg Fixed Allocation	4	Nutmeg Fixed Allocation Portfolio B
Nutmeg Fixed Allocation	4	Nutmeg Fixed Allocation Portfolio C
Nutmeg Fixed Allocation	4	Nutmeg Fixed Allocation Portfolio D
Nutmeg Fixed Allocation	4	Nutmeg Fixed Allocation Portfolio E
Nutmeg Socially Responsible	4	Nutmeg Socially Responsible Portfolio 1
Nutmeg Socially Responsible	4	Nutmeg Socially Responsible Portfolio 2
Nutmeg Socially Responsible	4	Nutmeg Socially Responsible Portfolio 3
Nutmeg Socially Responsible	4	Nutmeg Socially Responsible Portfolio 4
Nutmeg Socially Responsible	4	Nutmeg Socially Responsible Portfolio 5
Nutmeg Socially Responsible	4	Nutmeg Socially Responsible Portfolio 6
Nutmeg Socially Responsible	4	Nutmeg Socially Responsible Portfolio 7
Nutmeg Socially Responsible	4	Nutmeg Socially Responsible Portfolio 8
Nutmeg Socially Responsible	4	Nutmeg Socially Responsible Portfolio 9
Nutmeg Socially Responsible	4	Nutmeg Socially Responsible Portfolio 10
OCM OBI Active/Passive	4	OCM OBI Active 3
OCM OBI Active/Passive	4	OCM OBI Active 4
OCM OBI Active/Passive	4	OCM OBI Active 5
OCM OBI Active/Passive	4	OCM OBI Active 6
OCM OBI Active/Passive	4	OCM OBI Active 7
OCM OBI Active/Passive	4	OCM OBI Active 8
Octopus OPM	4	Octopus OPM 1/Cash
Octopus OPM	4	Octopus OPM 2/Cash Plus



Family name	Diamond Rating	Fund name
Octopus OPM	4	Octopus OPM 3/Defensive Capital Growth
Octopus OPM	4	Octopus OPM 4/Conservative Capital Growth
Octopus OPM	4	Octopus OPM 5/Moderate Capital Growth
Octopus OPM	4	Octopus OPM 6/Progressive Capital Growth
Octopus OPM	4	Octopus OPM 7/Managed Equity Growth
Octopus OPM	4	Octopus OPM 8/Advanced Equity Growth
Octopus OPM	4	Octopus OPM 9/Global Equity Opportunities
Octopus OPM	4	Octopus OPM 10/International Equity Focus
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 5
Parmenion PIM Tactical Income	4	Parmenion PIM Tactical Income - Risk Grade 6
Parmenion PIM Tactical Income	4	Parmenion PIM Tactical Income - Risk Grade 7
Parmenion PIM Tactical Income	4	Parmenion PIM Tactical Income - Risk Grade 8
Parmenion PIM Tactical Income	4	Parmenion PIM Tactical Income - Risk Grade 9
Parmenion PIM Tactical Income	4	Parmenion PIM Tactical Income - Risk Grade 10



Family name	Diamond Rating	Fund name
Parmenion Strategic Conviction	4	Parmenion Strategic Conviction Solution - Risk Grade 1
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
Premier MPS Plus	4	Premier Miton Capital Builder Plus Portfolio
Premier MPS Plus	4	Premier Miton Balanced Plus Portfolio
Premier MPS Plus	4	Premier Miton Growth Plus Portfolio
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
Psigma MPS	4	Psigma MPS Cautious
Psigma MPS	4	Psigma MPS Balanced
Psigma MPS	4	Psigma MPS Growth



Family name	Diamond Rating	Fund name
Psigma MPS	4	Psigma MPS Aggressive Growth
Rathbone MPS	4	Rathbone Cautious
Rathbone MPS	4	Rathbone Balanced
Rathbone MPS	4	Rathbone Balanced Plus
Rathbone MPS	4	Rathbone Equity
Rathbone MPS	4	Rathbone Equity Plus
Waverton MPS	4	Waverton Conservative Portfolio
Waverton MPS	4	Waverton Defensive Portfolio
Waverton MPS	4	Waverton Cautious Portfolio
Waverton MPS	4	Waverton Balanced Portfolio
Waverton MPS	4	Waverton Growth Portfolio
Wealthify Ethical	4	Wealthify Ethical Cautious
Wealthify Ethical	4	Wealthify Ethical Tentative
Wealthify Ethical	4	Wealthify Ethical Confident
Wealthify Ethical	4	Wealthify Ethical Ambitious
Wealthify Ethical	4	Wealthify Ethical Adventurous
Wellian MPS	4	Wellian Conservative
Wellian MPS	4	Wellian Balanced
Wellian MPS	4	Wellian Growth
Wellian MPS Passive	4	Wellian Conservative (Passive)
Wellian MPS Passive	4	Wellian Balanced (Passive)
Wellian MPS Passive	4	Wellian Growth (Passive)
Whitechurch PMS Dynamic	4	Whitechurch PMS Dynamic Defensive
Whitechurch PMS Dynamic	4	Whitechurch PMS Dynamic Cautious



Family name	Diamond Rating	Fund name
Whitechurch PMS Dynamic	4	Whitechurch PMS Dynamic Balanced
Whitechurch PMS Dynamic	4	Whitechurch PMS Dynamic Steady Growth
Whitechurch PMS Dynamic	4	Whitechurch PMS Dynamic Growth
Aberdeen Standard Capital Enhanced Diversification	3	ASC Enhanced Diversification MPS 1
Aberdeen Standard Capital Enhanced Diversification	3	ASC Enhanced Diversification MPS 2
Aberdeen Standard Capital Enhanced Diversification	3	ASC Enhanced Diversification MPS 3
Aberdeen Standard Capital Enhanced Diversification	3	ASC Enhanced Diversification MPS 4
Aberdeen Standard Capital Enhanced Diversification	3	ASC Enhanced Diversification MPS 5
Aberdeen Standard Capital Target	3	ASC Target MPS 1
Aberdeen Standard Capital Target	3	ASC Target MPS 2
Aberdeen Standard Capital Target	3	ASC Target MPS 3
Aberdeen Standard Capital Target	3	ASC Target MPS 4
Aberdeen Standard Capital Target	3	ASC Target MPS 5
AFH ATR Ethical	3	AFH Wealth ATR 1 - Ethical
AFH ATR Ethical	3	AFH Wealth ATR 2 - Ethical
AFH ATR Ethical	3	AFH Wealth ATR 3 - Ethical
AFH ATR Ethical	3	AFH Wealth ATR 4 - Ethical
AFH ATR Ethical	3	AFH Wealth ATR 5 - Ethical
AFH ATR Income	3	AFH Wealth ATR 1 - Income



Family name	Diamond Rating	Fund name
AFH ATR Income	3	AFH Wealth ATR 2 - Income
AFH ATR Income	3	AFH Wealth ATR 3 - Income
AFH ATR Income	3	AFH Wealth ATR 4 - Income
AFH ATR Income	3	AFH Wealth ATR 5 - Income
AFH ATR Passive	3	AFH Wealth ATR 1 - Passive
AFH ATR Passive	3	AFH Wealth ATR 2 - Passive
AFH ATR Passive	3	AFH Wealth ATR 3 - Passive
AFH ATR Passive	3	AFH Wealth ATR 4 - Passive
AFH ATR Passive	3	AFH Wealth ATR 5 - Passive
AJ Bell Active	3	AJ Bell Active MPS Portfolio 1
AJ Bell Active	3	AJ Bell Active MPS Portfolio 2
AJ Bell Active	3	AJ Bell Active MPS Portfolio 3
AJ Bell Active	3	AJ Bell Active MPS Portfolio 4
AJ Bell Active	3	AJ Bell Active MPS Portfolio 5
AJ Bell Active	3	AJ Bell Active MPS Portfolio 6
AJ Bell Pactive	3	AJ Bell Pactive MPS 1
AJ Bell Pactive	3	AJ Bell Pactive MPS 2
AJ Bell Pactive	3	AJ Bell Pactive MPS 3
AJ Bell Pactive	3	AJ Bell Pactive MPS 4
AJ Bell Pactive	3	AJ Bell Pactive MPS 5
AJ Bell Pactive	3	AJ Bell Pactive MPS 6
Alpha - CO	3	Alpha Portfolio Management Defensive - CO
Alpha - CO	3	Alpha Portfolio Management Cautious - CO
Alpha - CO	3	Alpha Portfolio Management Moderate - CO



Family name	Diamond Rating	Fund name
Alpha - CO	3	Alpha Portfolio Management Moderately Adventurous - CO
Alpha - CO	3	Alpha Portfolio Management Adventurous - CO
Alpha - CO	3	Alpha Portfolio Management Speculative - CO
Alpha - DEC	3	Alpha Portfolio Management Defensive - DEC
Alpha - DEC	3	Alpha Portfolio Management Cautious - DEC
Alpha - DEC	3	Alpha Portfolio Management Moderate - DEC
Alpha - DEC	3	Alpha Portfolio Management Moderately Adventurous - DEC
Alpha - DEC	3	Alpha Portfolio Management Adventurous - DEC
Alpha - DEC	3	Alpha Portfolio Management Speculative - DEC
Alpha Ethical	3	Alpha Portfolio Management Ethical Cautious
Alpha Ethical	3	Alpha Portfolio Management Ethical Moderate
Alpha Ethical	3	Alpha Portfolio Management Ethical Growth
BMAM MPS Passive	3	Brooks Macdonald Low to Medium Risk (Passive): (Income & Growth)
BMAM MPS Passive	3	Brooks Macdonald Medium Risk (Passive): (Income & Growth)
BMAM MPS Passive	3	Brooks Macdonald Medium to High Risk (Passive): (Growth)
Bordier Risk Targeted MPS	3	Bordier Risk Targeted (RT) Managed Service RT3
Bordier Risk Targeted MPS	3	Bordier Risk Targeted (RT) Managed Service RT4
Bordier Risk Targeted MPS	3	Bordier Risk Targeted (RT) Managed Service RT5
Bordier Risk Targeted MPS	3	Bordier Risk Targeted (RT) Managed Service RT6
Bordier Risk Targeted MPS	3	Bordier Risk Targeted (RT) Managed Service RT7
Canaccord MPS	3	Canaccord Fixed Interest
Canaccord MPS	3	Canaccord Cash Plus



Family name	Diamond Rating	Fund name
Canaccord MPS	3	Canaccord Cautious Balanced
Canaccord MPS	3	Canaccord Balanced
Canaccord MPS	3	Canaccord Growth
Canaccord MPS	3	Canaccord Aggressive Growth
Canaccord Smart Passive MPS	3	Canaccord Smart Passive Cash Plus
Canaccord Smart Passive MPS	3	Canaccord Smart Passive Cautious Balanced
Canaccord Smart Passive MPS	3	Canaccord Smart Passive Balanced
Canaccord Smart Passive MPS	3	Canaccord Smart Passive Growth
Canaccord Smart Passive MPS	3	Canaccord Smart Passive Aggressive Growth
Casterbridge MPS	3	Casterbridge Hardy 3
Casterbridge MPS	3	Casterbridge Hardy 4
Casterbridge MPS	3	Casterbridge Hardy 5
Casterbridge MPS	3	Casterbridge Hardy 6
Casterbridge MPS	3	Casterbridge Hardy 7
Charles Stanley DFM	3	Charles Stanley DFM Income
Charles Stanley DFM	3	Charles Stanley DFM Balanced
Charles Stanley DFM	3	Charles Stanley DFM Growth
Church House CHAMPS	3	Church House Cautious Income Portfolio (Risk 3)
Church House CHAMPS	3	Church House Income Portfolio (Risk 4)
Church House CHAMPS	3	Church House Income & Growth Portfolio (Risk 5)
Church House CHAMPS	3	Church House Equity Growth with Income Portfolio (Risk 6)
Church House CHAMPS	3	Church House Equity Growth Portfolio (Risk 7)
Church House CHAMPS	3	Church House Higher Risk Equity Growth Portfolio (Risk 8)





Family name	Diamond Rating	Fund name
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
Cornelian RMP	3	Cornelian Defensive RMP
Cornelian RMP	3	Cornelian Cautious RMP
Cornelian RMP	3	Cornelian Managed Growth RMP
Cornelian RMP	3	Cornelian Growth RMP
Cornelian RMP	3	Cornelian Progressive RMP
Fundment MPS	3	Fundment Conservative
Fundment MPS	3	Fundment Cautious
Fundment MPS	3	Fundment Balanced
Fundment MPS	3	Fundment Moderate
Fundment MPS	3	Fundment Progressive
Fundment MPS	3	Fundment Growth
Fundment MPS	3	Fundment Adventurous
Fundment MPS	3	Fundment Aggressive
Fundment MPS	3	Fundment Ultra - Aggressive
Fusion Wealth Ethical	3	Fusion Wealth Ethical Cautious Portfolio
Fusion Wealth Ethical	3	Fusion Wealth Ethical Balanced Portfolio
Fusion Wealth Ethical	3	Fusion Wealth Ethical Adventurous Portfolio
GHC DCS Plus	3	GHC DCS Plus RG3
GHC DCS Plus	3	GHC DCS Plus RG4



Family name	Diamond Rating	Fund name
GHC DCS Plus	3	GHC DCS Plus RG5
GHC DCS Plus	3	GHC DCS Plus RG6
GHC DCS Plus	3	GHC DCS Plus RG7
GHC DCS Plus	3	GHC DCS Plus RG8
James Brearley Inclusive	3	James Brearley Conservative (Inclusive Model)
James Brearley Inclusive	3	James Brearley Defensive (Inclusive Model)
James Brearley Inclusive	3	James Brearley Cautious (Inclusive Model)
James Brearley Inclusive	3	James Brearley Balanced (Inclusive Model)
James Brearley Inclusive	3	James Brearley Dynamic (Inclusive Model)
James Brearley Inclusive	3	James Brearley Direct Equity (Inclusive Model)
James Brearley Transaction	3	James Brearley Conservative (Transaction Model)
James Brearley Transaction	3	James Brearley Defensive (Transaction Model)
James Brearley Transaction	3	James Brearley Cautious (Transaction Model)
James Brearley Transaction	3	James Brearley Balanced (Transaction Model)
James Brearley Transaction	3	James Brearley Dynamic (Transaction Model)
James Brearley Transaction	3	James Brearley Direct Equity (Transaction Model)
LGT Vestra Sustainable MPS	3	LGT Vestra Sustainable Defensive
LGT Vestra Sustainable MPS	3	LGT Vestra Sustainable Cautious
LGT Vestra Sustainable MPS	3	LGT Vestra Sustainable Balanced
LGT Vestra Sustainable MPS	3	LGT Vestra Sustainable Growth
LGT Vestra Sustainable MPS	3	LGT Vestra Sustainable Adventurous
MitonOptimal MMPS	3	MitonOptimal MMPS 2
MitonOptimal MMPS	3	MitonOptimal MMPS 3
MitonOptimal MMPS	3	MitonOptimal MMPS 4



Family name	Diamond Rating	Fund name
MitonOptimal MMPS	3	MitonOptimal MMPS 5
MitonOptimal MMPS	3	MitonOptimal MMPS 6
Novia Copia Select	3	Copia Select - Cautious
Novia Copia Select	3	Copia Select - Moderate
Novia Copia Select	3	Copia Select - Balanced
Novia Copia Select	3	Copia Select - Growth
Novia Copia Select	3	Copia Select - Equity
Novia Copia Volatility	3	Copia Volatility Focus 1
Novia Copia Volatility	3	Copia Volatility Focus 2
Novia Copia Volatility	3	Copia Volatility Focus 3
Novia Copia Volatility	3	Copia Volatility Focus 4
Novia Copia Volatility	3	Copia Volatility Focus 5
Novia Copia Volatility	3	Copia Volatility Focus 6
Novia Copia Volatility	3	Copia Volatility Focus 7
Novia Copia Volatility	3	Copia Volatility Focus 8
Novia Copia Volatility	3	Copia Volatility Focus 9
Novia Copia Volatility	3	Copia Volatility Focus 10
OCM LHX	3	OCM LHX Cautious
OCM LHX	3	OCM LHX Balanced
OCM LHX	3	OCM LHX Aggressive
OCM OBI Ethical	3	OCM OBI Ethical 3
OCM OBI Ethical	3	OCM OBI Ethical 5
OCM OBI Ethical	3	OCM OBI Ethical 7
P1 MPS	3	P1 Investment Management Protective



Family name	Diamond Rating	Fund name
P1 MPS	3	P1 Investment Management Lower Risk Growth
P1 MPS	3	P1 Investment Management Growth Focus
P1 MPS	3	P1 Investment Management Growth Seeker
P1 MPS	3	P1 Investment Management Adventurous
P1 MPS Passive	3	P1 Investment Management Passive Conservative
P1 MPS Passive	3	P1 Investment Management Passive Cautious
P1 MPS Passive	3	P1 Investment Management Passive Cautious Moderate
P1 MPS Passive	3	P1 Investment Management Passive Moderate
P1 MPS Passive	3	P1 Investment Management Passive Moderate Adventurous
P1 MPS Passive	3	P1 Investment Management Passive Adventurous
Price Bailey MPS	3	TPC Risk Level 3
Price Bailey MPS	3	TPC Risk Level 4
Price Bailey MPS	3	TPC Risk Level 5
Price Bailey MPS	3	TPC Risk Level 6
Price Bailey MPS	3	TPC Risk Level 7
Price Bailey MPS	3	TPC Risk Level 8
Progeny	3	Progeny DT3
Progeny	3	Progeny DT4
Progeny	3	Progeny DT5
Progeny	3	Progeny DT6
Progeny	3	Progeny DT7
Prospect MPS	3	Prospect 100% Bonds



Family name	Diamond Rating	Fund name
Prospect MPS	3	Prospect 75% Bonds 21% Equities & 4% Alternatives
Prospect MPS	3	Prospect 50% Bonds 43% Equities % 7% Alternatives
Prospect MPS	3	Prospect 25% Bonds 65% Equities % 10% Alternatives
Prospect MPS	3	Prospect 85% Equities % 15% Alternatives
Psigma SRI MPS	3	Psigma SRI MPS Cautious
Psigma SRI MPS	3	Psigma SRI MPS Balanced
Psigma SRI MPS	3	Psigma SRI MPS Growth
Psigma SRI MPS	3	Psigma SRI MPS Aggressive Growth
Quilter Cheviot MPS	3	Quilter Cheviot Cautious
Quilter Cheviot MPS	3	Quilter Cheviot Conservative
Quilter Cheviot MPS	3	Quilter Cheviot Income
Quilter Cheviot MPS	3	Quilter Cheviot Global Income
Quilter Cheviot MPS	3	Quilter Cheviot Balanced
Quilter Cheviot MPS	3	Quilter Cheviot Growth
Quilter Cheviot MPS	3	Quilter Cheviot Global Growth
RC Brown Conventional	3	RC Brown Cautious Portfolio (Conventional)
RC Brown Conventional	3	RC Brown Cautious Balanced Portfolio (Conventional)
RC Brown Conventional	3	RC Brown Balanced Portfolio (Conventional)
RC Brown Conventional	3	RC Brown Balanced Growth Portfolio (Conventional)
RC Brown Conventional	3	RC Brown Growth Portfolio (Conventional)
RC Brown Performance	3	RC Brown Cautious Portfolio (Performance)



Family name	Diamond Rating	Fund name
RC Brown Performance	3	RC Brown Cautious Balanced Portfolio (Performance)
RC Brown Performance	3	RC Brown Balanced Portfolio (Performance)
RC Brown Performance	3	RC Brown Balanced Growth Portfolio (Performance)
RC Brown Performance	3	RC Brown Growth Portfolio (Performance)
RD Intermediaries	3	RD Intermediaries Defensive
RD Intermediaries	3	RD Intermediaries Balanced
RD Intermediaries	3	RD Intermediaries Growth
RD Intermediaries	3	RD Intermediaries Adventurous
Saltus MPS	3	Saltus 33
Saltus MPS	3	Saltus 50
Saltus MPS	3	Saltus 67
Scalable VaR	3	Scalable 3% VaR Portfolio
Scalable VaR	3	Scalable 4% VaR Portfolio
Scalable VaR	3	Scalable 5% VaR Portfolio
Scalable VaR	3	Scalable 7% VaR Portfolio
Scalable VaR	3	Scalable 8% VaR Portfolio
Scalable VaR	3	Scalable 9% VaR Portfolio
Scalable VaR	3	Scalable 10% VaR Portfolio
Scalable VaR	3	Scalable 11% VaR Portfolio
Scalable VaR	3	Scalable 12% VaR Portfolio
Scalable VaR	3	Scalable 13% VaR Portfolio
Scalable VaR	3	Scalable 14% VaR Portfolio
Scalable VaR	3	Scalable 15% VaR Portfolio



Family name	Diamond Rating	Fund name
Scalable VaR	3	Scalable 16% VaR Portfolio
Scalable VaR	3	Scalable 17% VaR Portfolio
Scalable VaR	3	Scalable 18% VaR Portfolio
Scalable VaR	3	Scalable 19% VaR Portfolio
Scalable VaR	3	Scalable 20% VaR Portfolio
Scalable VaR	3	Scalable 21% VaR Portfolio
Scalable VaR	3	Scalable 22% VaR Portfolio
Scalable VaR	3	Scalable 23% VaR Portfolio
Scalable VaR	3	Scalable 24% VaR Portfolio
Scalable VaR	3	Scalable 25% VaR Portfolio
TAM Ethical	3	TAM Asset Management ESG Defensive
TAM Ethical	3	TAM Asset Management ESG Cautious
TAM Ethical	3	TAM Asset Management ESG Balanced
TAM Ethical	3	TAM Asset Management ESG Growth
TAM Ethical	3	TAM Asset Management ESG Adventurous
TAM Focus	3	TAM Asset Management Focus Defensive
TAM Focus	3	TAM Asset Management Focus Cautious
TAM Focus	3	TAM Asset Management Focus Balanced
TAM Focus	3	TAM Asset Management Focus Growth
TAM Focus	3	TAM Asset Management Focus Adventurous
TAM Premier	3	TAM Asset Management Premier Liquidity Plus
TAM Premier	3	TAM Asset Management Premier Defensive
TAM Premier	3	TAM Asset Management Premier Cautious
TAM Premier	3	TAM Asset Management Premier Balanced



Family name	Diamond Rating	Fund name
TAM Premier	3	TAM Asset Management Premier Growth
TAM Premier	3	TAM Asset Management Premier Adventurous
TAM Premier	3	TAM Asset Management Premier Speculative
TAM Sharia	3	TAM Asset Management Sharia Defensive
TAM Sharia	3	TAM Asset Management Sharia Cautious
TAM Sharia	3	TAM Asset Management Sharia Balanced
TAM Sharia	3	TAM Asset Management Sharia Growth
TAM Sharia	3	TAM Asset Management Sharia Adventurous
True Potential MPS	3	True Potential Defensive Portfolio
True Potential MPS	3	True Potential Cautious Portfolio
True Potential MPS	3	True Potential Cautious Plus Portfolio
True Potential MPS	3	True Potential Balanced Portfolio
True Potential MPS	3	True Potential Balanced Plus Portfolio
True Potential MPS	3	True Potential Growth Portfolio
True Potential MPS	3	True Potential Growth Plus Portfolio
True Potential MPS	3	True Potential Aggressive Portfolio
VAM MPS	3	VAM Cautious
VAM MPS	3	VAM Cautious Balanced
VAM MPS	3	VAM Balanced
VAM MPS	3	VAM Balanced Growth
VAM MPS	3	VAM Growth
Walker Crips MPS	3	Walker Crips Defensive
Walker Crips MPS	3	Walker Crips Conservative
Walker Crips MPS	3	Walker Crips Balanced





Family name	Diamond Rating	Fund name
Walker Crips MPS	3	Walker Crips Growth
Walker Crips MPS Direct	3	Walker Crips MPS Conservative
Walker Crips MPS Direct	3	Walker Crips MPS Balanced
Walker Crips MPS Direct	3	Walker Crips MPS Moderate
Walker Crips MPS Direct	3	Walker Crips MPS Growth
Walker Crips MPS Direct	3	Walker Crips MPS Global Growth
Walker Crips MPS Income	3	Walker Crips Conservative Higher Income
Walker Crips MPS Income	3	Walker Crips Income
Walker Crips MPS Income	3	Walker Crips Higher Income
Canaccord ESG	2	Canaccord ESG Cautious Balanced
Canaccord ESG	2	Canaccord ESG Balanced
Canaccord ESG	2	Canaccord ESG Growth
Fundment Ethical	2	Fundment Cautious - Ethical
Fundment Ethical	2	Fundment Balanced - Ethical
Fundment Ethical	2	Fundment Progressive - Ethical
Fundment Ethical	2	Fundment Growth - Ethical
Fundment Ethical	2	Fundment Ultra - Aggressive - Ethical
P1 MPS Ethical	2	P1 Investment Management Ethical Lower Risk
P1 MPS Ethical	2	P1 Investment Management Ethical Temperate
P1 MPS Ethical	2	P1 Investment Management Ethical Growth
Sanlam PW MPS Income	2	Sanlam Private Wealth Portfolio 2 Income
Sanlam PW MPS Income	2	Sanlam Private Wealth Portfolio 3 Income
Sanlam PW MPS Income	2	Sanlam Private Wealth Portfolio 4 Income
Sanlam PW MPS Income	2	Sanlam Private Wealth Portfolio 5 Income



Family name	Diamond Rating	Fund name
TAM Passive	2	TAM Asset Management Passive Defensive
TAM Passive	2	TAM Asset Management Passive Cautious
TAM Passive	2	TAM Asset Management Passive Balanced
TAM Passive	2	TAM Asset Management Passive Growth
TAM Passive	2	TAM Asset Management Passive Adventurous
Arbuthnot CIS	1	Arbuthnot CIS1
Arbuthnot CIS	1	Arbuthnot CIS2
Arbuthnot CIS	1	Arbuthnot CIS3
Arbuthnot CIS	1	Arbuthnot CIS4
Arbuthnot CIS	1	Arbuthnot CIS5
Arbuthnot CIS	1	Arbuthnot CIS6
Arbuthnot DIS	1	Arbuthnot DIS1
Arbuthnot DIS	1	Arbuthnot DIS2
Arbuthnot DIS	1	Arbuthnot DIS3
Arbuthnot DIS	1	Arbuthnot DIS4
Arbuthnot DIS	1	Arbuthnot DIS5
Arbuthnot DIS	1	Arbuthnot DIS6
Casterbridge Sustainable Impact MPS	1	Casterbridge Sustainable Impact 4
Casterbridge Sustainable Impact MPS	1	Casterbridge Sustainable Impact 5
Casterbridge Sustainable Impact MPS	1	Casterbridge Sustainable Impact 6