

# Fusion Alpha H5 GBP, USD & EUR

June 2025

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# Fusion Alpha H5 | Sterling

## Strategy Overview

In pursuit of attractive targeted returns, Fusion invests in a broad range of asset classes designed to maximise its ability to deliver returns whilst minimising the associated risk.

The Fusion Strategies are constructed around a managed portfolio of collective investment schemes, delivering a unique combination of diversification, flexibility and efficiency.

Fusion Alpha H5 Strategy is designed for investors who are prepared to accept a moderate level of risk to achieve higher potential returns. The strategy balances a strategic exposure to equities and other higher risk investments, with a lesser weighting to lower risk investment asset classes.

## Key Data

**Minimum Initial Investment:**  
£100,000 or currency equivalent.

**Currencies available:**  
GBP, USD, EUR

**Approximate Ongoing Charges Figure (OCF):** 1.3%

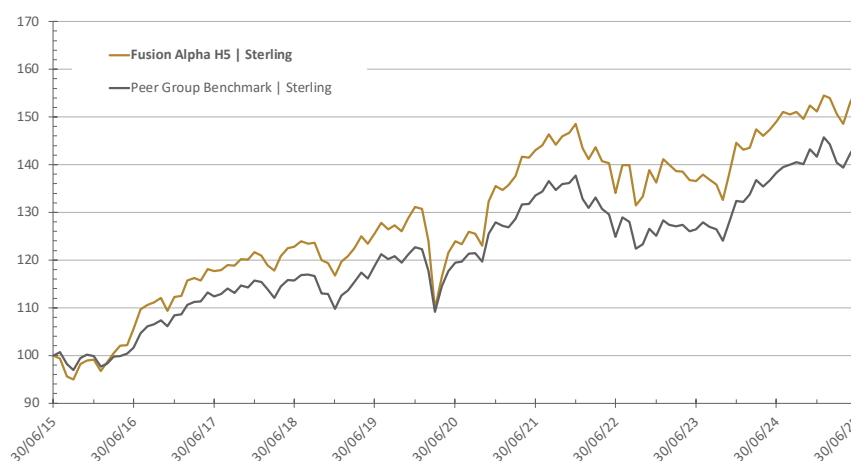
**Investment Manager:**  
Sean Mills CFA

**Investment Time Horizon:**  
5+ Years

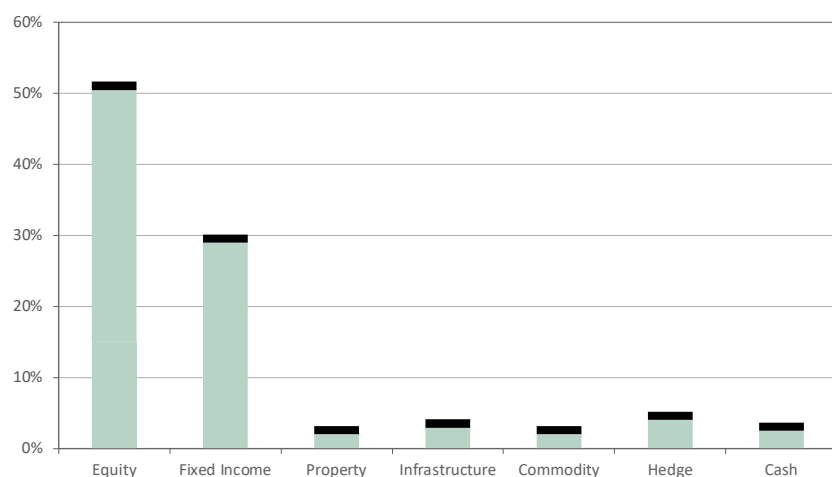
## Sterling Performance\*

	Fusion Alpha H5	Peer Group Benchmark
1 mth	1.8%	1.5%
3 mths	3.5%	2.9%
6 mths	3.1%	1.9%
1 year	4.5%	4.4%
3 years	16.2%	15.7%
5 years	25.8%	20.9%
10 years	55.8%	44.4%

\*Fusion Alpha H5 Sterling performance is net of fees and is compared to a Peer Group Benchmark.

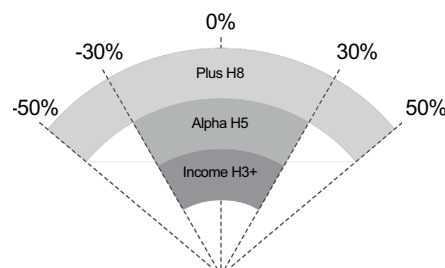


## Asset Allocation



## Swing Factors

Fusion Alpha H5 is actively managed using a 30% swing factor around its strategic targets. This allows us to respond to the investment climate, reducing risk during periods of turbulence and increasing it during periods of growth.



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# Fusion Alpha H5 | US Dollar

## Strategy Overview

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## Key Data

**Minimum Initial Investment:**  
£100,000 or currency equivalent.

**Currencies available:**  
GBP, USD, EUR

**Approximate Ongoing Charges Figure (OCF):** 1.3%

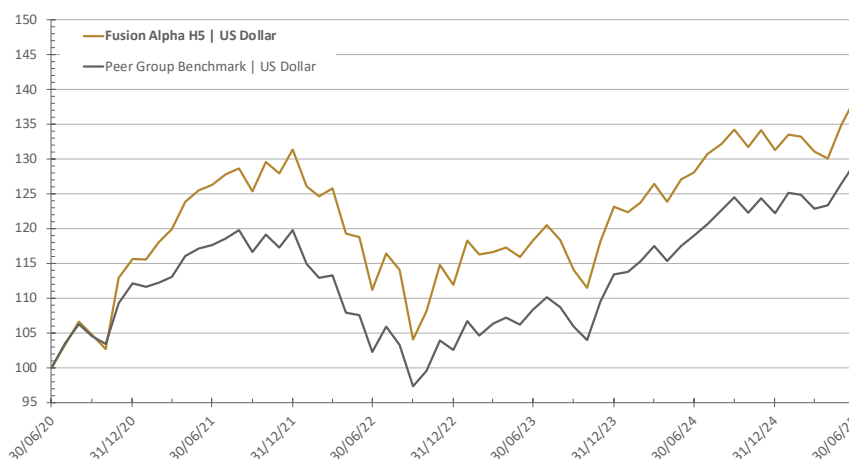
**Investment Manager:**  
Sean Mills CFA

**Investment Time Horizon:**  
5+ Years

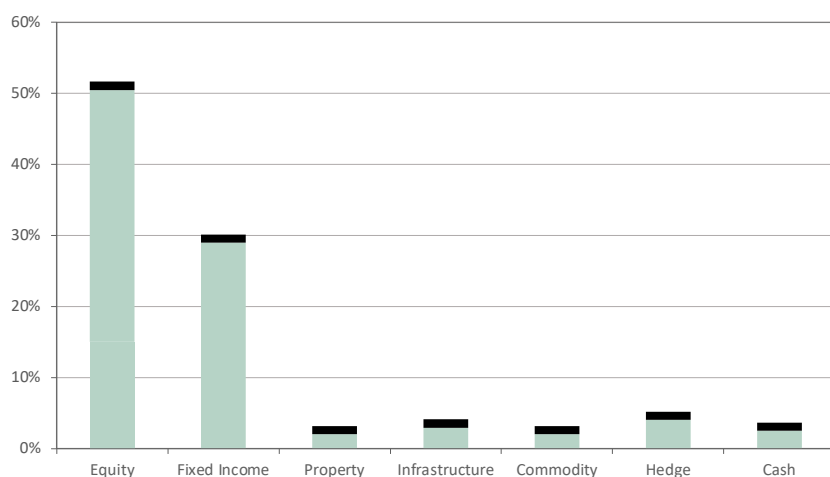
## US Dollar Performance\*

	Fusion Alpha H5	Peer Group Benchmark
1 mth	2.8%	2.4%
3 mths	5.7%	5.3%
6 mths	5.5%	5.9%
1 year	8.2%	8.7%
2 years	17.1%	19.4%
3 years	24.6%	26.6%
5 years	38.6%	29.4%

\*Fusion Alpha H5 US Dollar performance is net of fees and is compared to a Peer Group Benchmark.

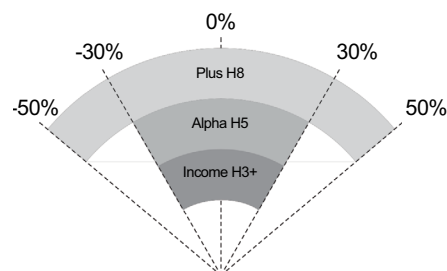


## Asset Allocation



## Swing Factors

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# Fusion Alpha

## H5 | Euro

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### Key Data

**Minimum Initial Investment:**  
£100,000 or currency equivalent.

**Currencies available:**  
GBP, USD, EUR

**Approximate Ongoing Charges Figure (OCF):** 1.3%

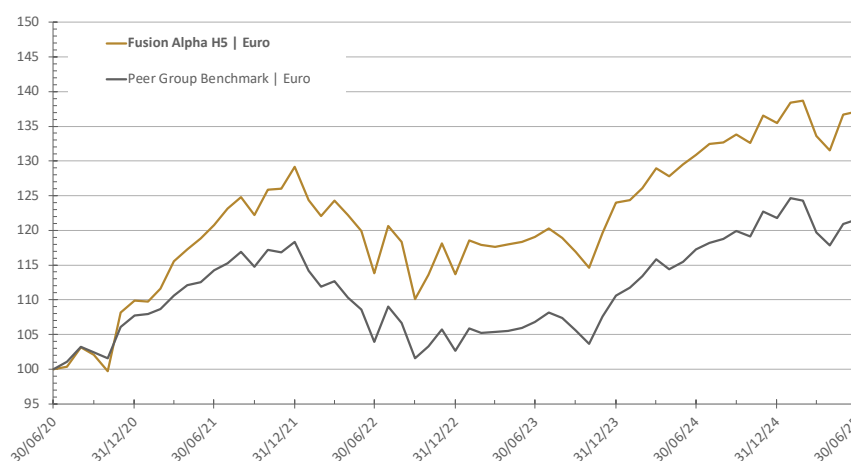
**Investment Manager:**  
Sean Mills CFA

**Investment Time Horizon:**  
5+ Years

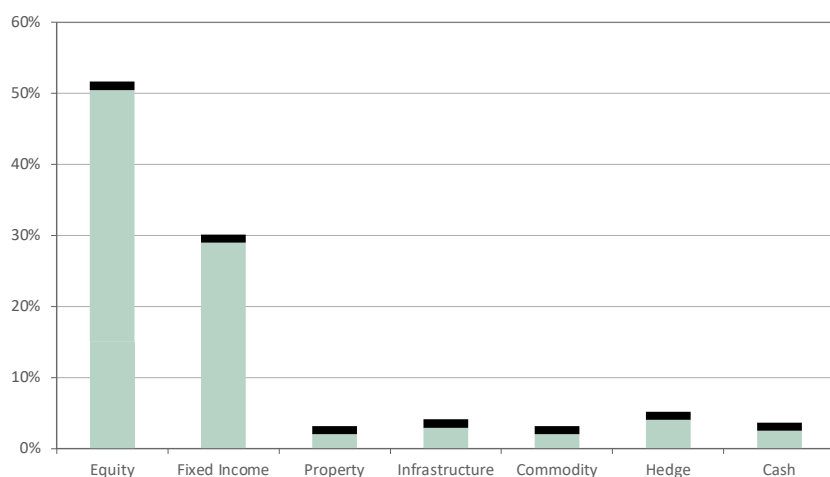
### Euro Performance\*

	Fusion Alpha H5	Peer Group Benchmark
1 mth	0.3%	0.5%
3 mths	2.6%	1.6%
6 mths	1.3%	-0.2%
1 year	4.8%	3.7%
2 years	15.2%	13.8%
3 years	20.5%	16.9%
5 years	37.1%	21.5%

\*Fusion Alpha H5 Euro performance is net of fees and is compared to a Peer Group Benchmark.

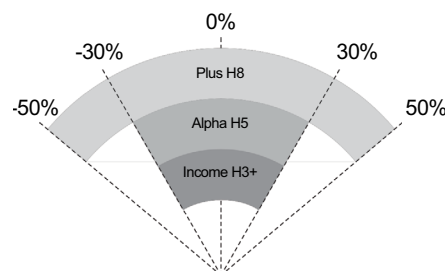


### Asset Allocation



### Swing Factors

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Issue Date: 11/07/2025

Ref: FFS-H506025

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