



Fusion Alpha H5 GBP, USD & EUR

July 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%

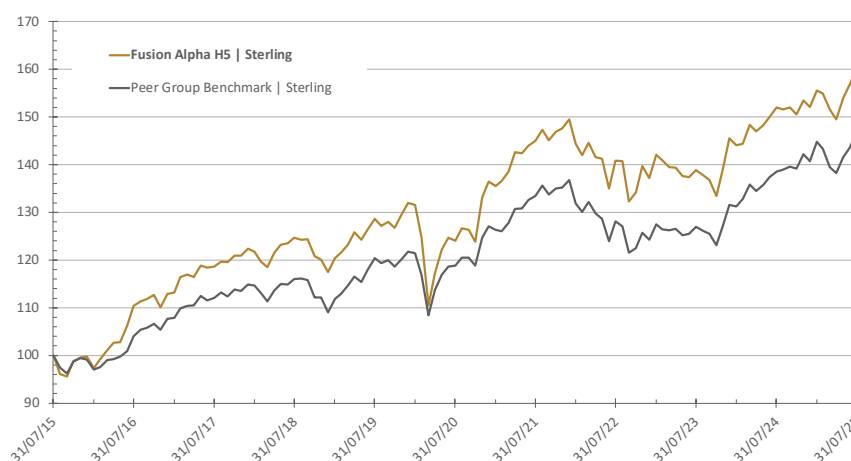
Investment Manager:
Sean Mills CFA

Investment Time Horizon:
5+ Years

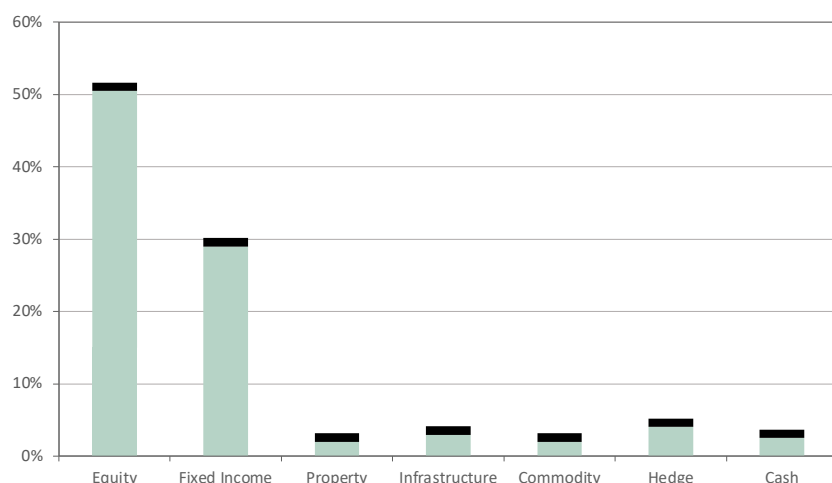
Sterling Performance*

	Fusion Alpha H5	Peer Group Benchmark
1 mth	2.2%	2.2%
3 mths	7.2%	6.2%
6 mths	3.1%	1.4%
1 year	5.4%	5.9%
3 years	13.8%	14.6%
5 years	29.2%	23.5%
10 years	60.3%	46.8%

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

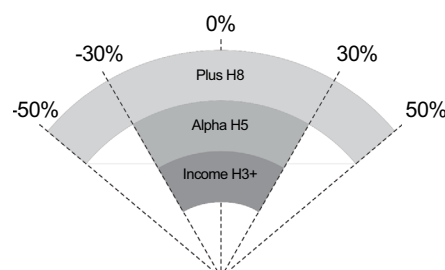


Asset Allocation



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

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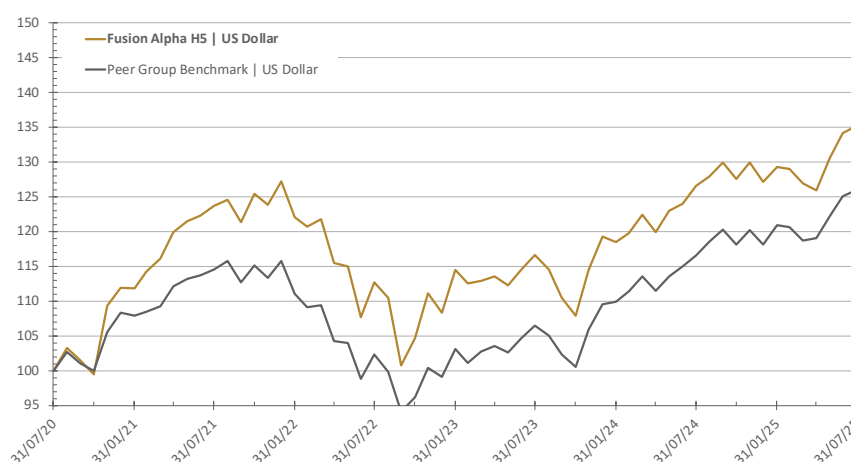
Investment Manager:
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Investment Time Horizon:
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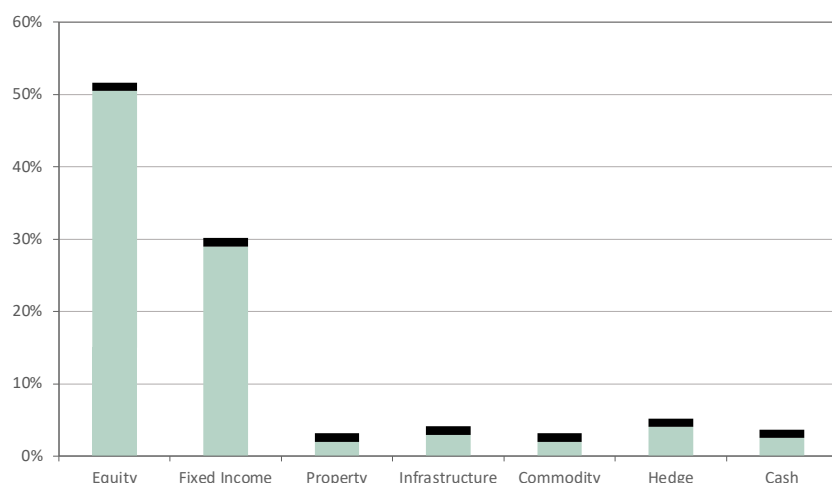
US Dollar Performance*

	Fusion Alpha H5	Peer Group Benchmark
1 mth	0.8%	0.7%
3 mths	7.4%	5.8%
6 mths	4.6%	4.2%
1 year	6.8%	8.0%
2 years	15.9%	18.3%
3 years	20.0%	23.1%
5 years	35.2%	26.0%

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

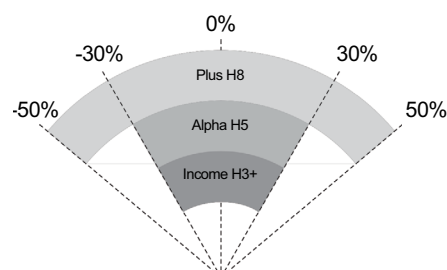


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Fusion Alpha

H5 | Euro

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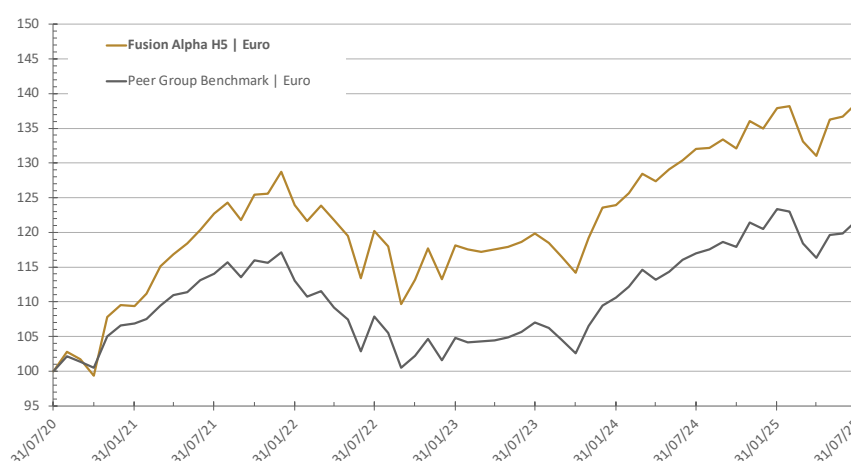
Investment Manager:
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Investment Time Horizon:
5+ Years

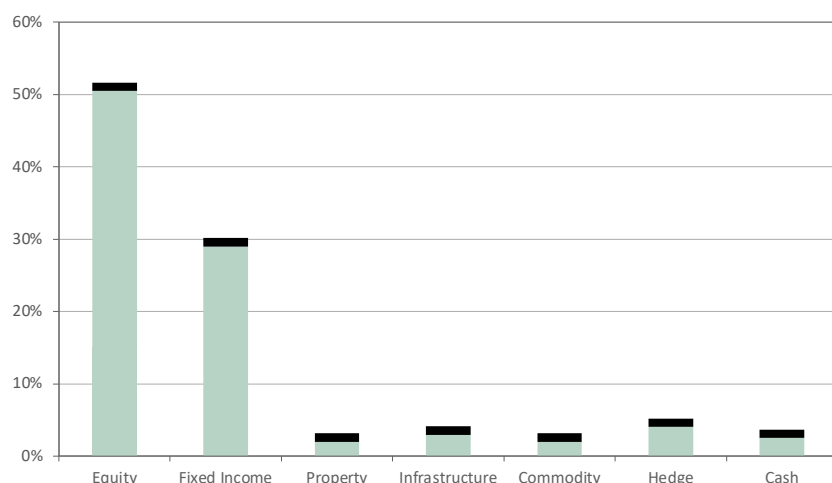
Euro Performance*

	Fusion Alpha H5	Peer Group Benchmark
1 mth	1.5%	1.6%
3 mths	5.8%	4.7%
6 mths	0.5%	-1.3%
1 year	5.0%	4.1%
2 years	15.7%	13.7%
3 years	15.3%	12.9%
5 years	38.6%	21.7%

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

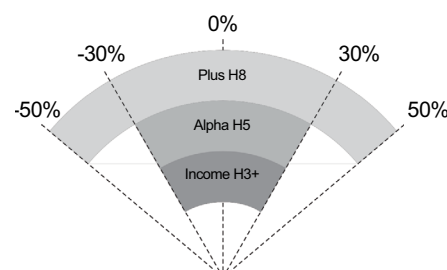


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Issue Date: 11/08/2025

Ref: FFS-H507025

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