



# Fusion Alpha H5 GBP, USD & EUR

March 2026

Create Tomorrow.  
Start Today.

# 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

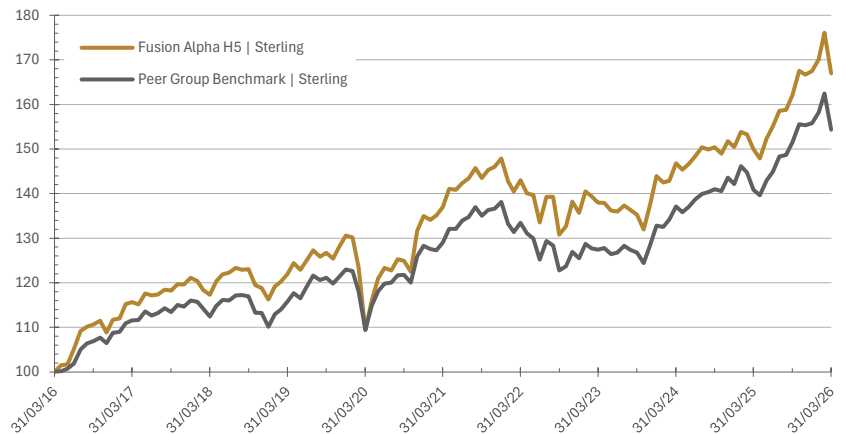
Approximate Ongoing Charges Figure (OCF): 1.3%

Investment Manager: Sean Mills CFA

Investment Time Horizon: 5+ Years

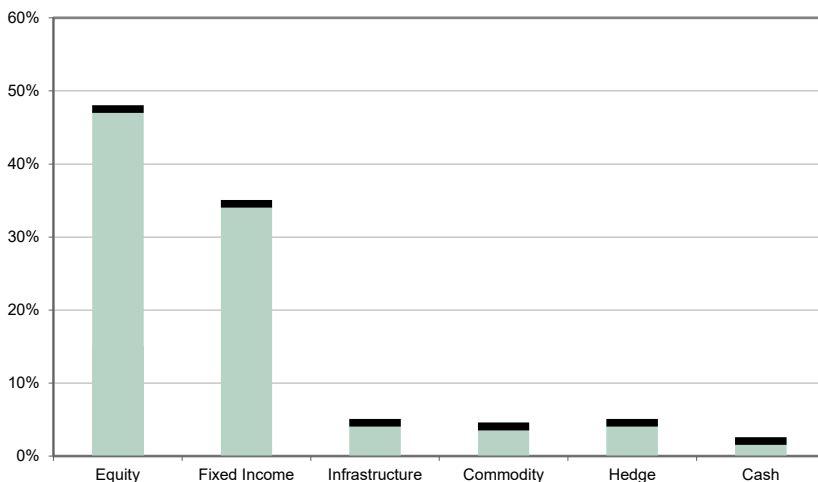
## Sterling Performance\*

	Fusion Alpha H5	Peer Group Benchmark
1 mth	-5.2%	-5.0%
3 mths	-0.3%	-0.9%
6 mths	3.0%	1.9%
1 year	11.3%	9.6%
3 years	21.0%	21.1%
5 years	21.9%	19.6%
10 years	67.0%	54.4%



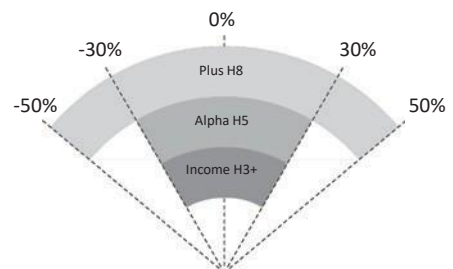
\*Fusion Alpha H5 Sterling performance is net of fees and is compared to a Peer Group Benchmark.

## 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.



# Fusion Alpha H5 | US Dollar

## 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

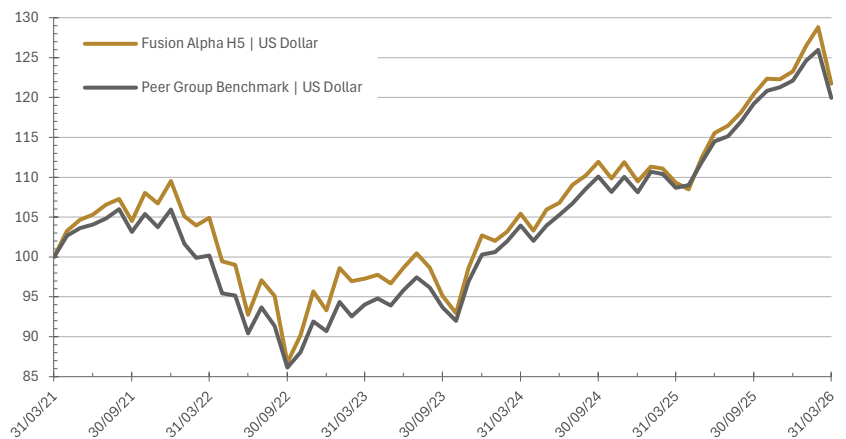
Approximate Ongoing Charges  
Figure (OCF): 1.3%

Investment Manager:  
Sean Mills CFA

Investment Time Horizon:  
5+ Years

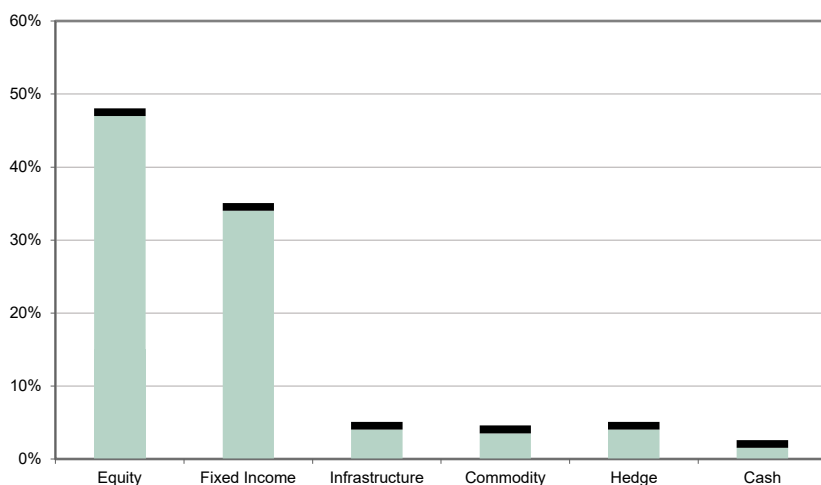
## US Dollar Performance\*

	Fusion Alpha H5	Peer Group Benchmark
1 mth	-5.5%	-4.8%
3 mths	-1.3%	-1.8%
6 mths	1.1%	0.6%
1 year	11.4%	10.4%
2 years	15.5%	15.4%
3 years	25.2%	27.6%
5 years	21.7%	20.0%



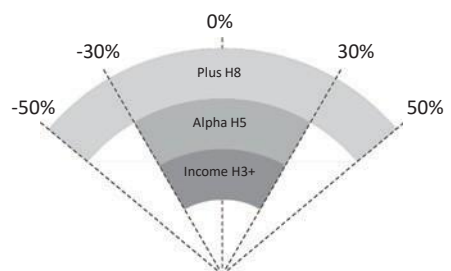
\*Fusion Alpha H5 US Dollar performance is net of fees and is compared to a Peer Group Benchmark.

## 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.



# Fusion Alpha H5 | Euro

## 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

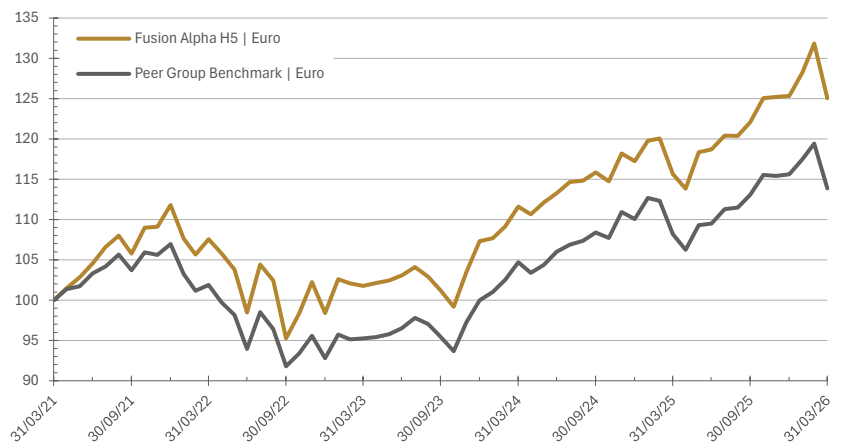
Approximate Ongoing Charges Figure (OCF): 1.3%

Investment Manager: Sean Mills CFA

Investment Time Horizon: 5+ Years

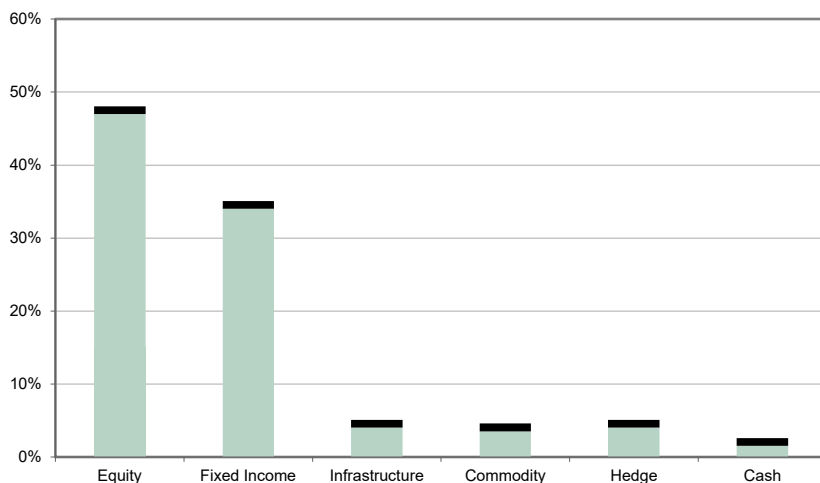
## Euro Performance\*

	Fusion Alpha H5	Peer Group Benchmark
1 mth	-5.2%	-4.6%
3 mths	-0.2%	-1.5%
6 mths	2.4%	0.7%
1 year	8.1%	5.3%
2 years	12.0%	8.8%
3 years	22.8%	19.6%
5 years	25.0%	13.9%



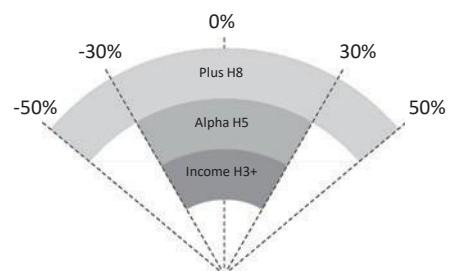
\*Fusion Alpha H5 Euro performance is net of fees and is compared to a Peer Group Benchmark.

## 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.



Isle of Man | Head Office  
Capital International Group  
Capital House  
Circular Road  
Douglas  
Isle of Man  
IM1 1AG

+44 (0) 1624 654200  
[info@capital-iom.com](mailto:info@capital-iom.com)

South Africa Office  
Capital International SA  
Great Westerford  
240 Main Road  
Rondebosch 7700  
South Africa

+27 (0) 21 201 1070  
[info@capital-sa.com](mailto:info@capital-sa.com)

[capital-iom.com](http://capital-iom.com)

t +44 (0) 1624 654200 e [businessdevelopment@capital-iom.com](mailto:businessdevelopment@capital-iom.com)

This document has been prepared for information purposes only, is believed to be correct as at the issue date hereof, but its accuracy cannot be guaranteed. Information in this document does not constitute investment advice or an offer or an invitation by or on behalf of any company within the Group to buy or sell any product or security or to make a bank deposit. Any reference to past performance is not necessarily a guide to the future. The value of investments may go down as well as up and may be adversely affected by currency fluctuations. The Group, its subsidiary companies, clients, and officers may have a position in, or engage in transactions in any of the investments mentioned. Opinions constitute views as at the date of issue thereof and are subject to change.

Capital International Limited is a subsidiary of Capital International Group Limited and is licensed by the Isle of Man Financial Services Authority. Capital International Limited is a member of the London Stock Exchange. Capital International, Capital International Asset Management, and Capital International Investment Platform are trading names of Capital International Limited.

Issue Date: 08/01/2026

Ref: FFS-H5v1

**Create Tomorrow.  
Start Today.**

 Do you really need to print this? We are serious about climate change & biodiversity loss. For more information, please [click here](#).