



Fusion Alpha H5 GBP, USD & EUR

July 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%

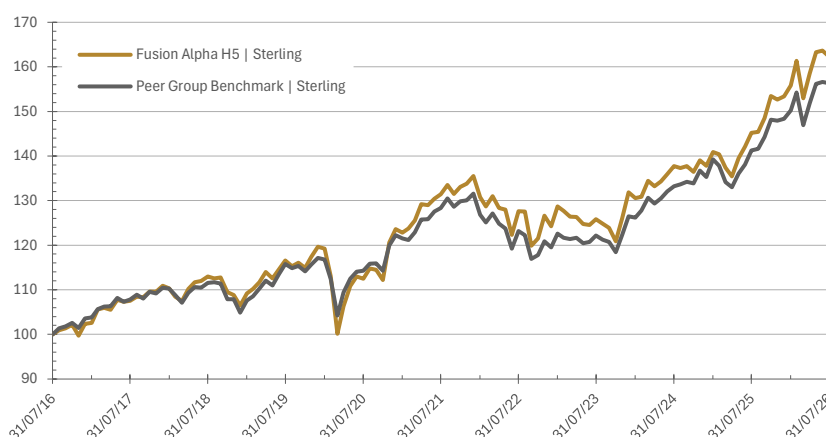
Investment Manager:
Sean Mills CFA

Investment Time Horizon:
5+ Years

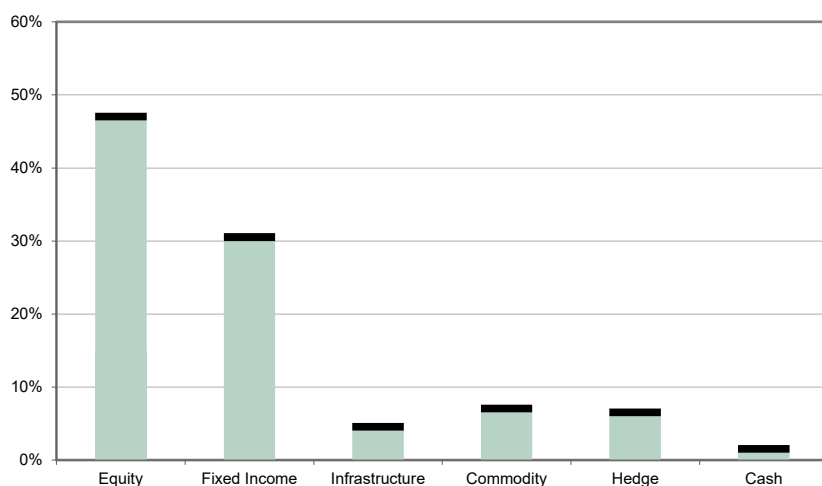
Sterling Performance*

	Fusion Alpha H5	Peer Group Benchmark
1 mth	-0.8%	-0.2%
3 mths	2.4%	3.0%
6 mths	4.1%	4.0%
1 year	11.7%	10.7%
3 years	29.0%	27.9%
5 years	23.5%	21.8%
10 years	62.3%	56.3%

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

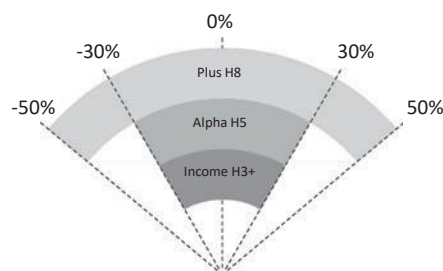


Asset Allocation



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

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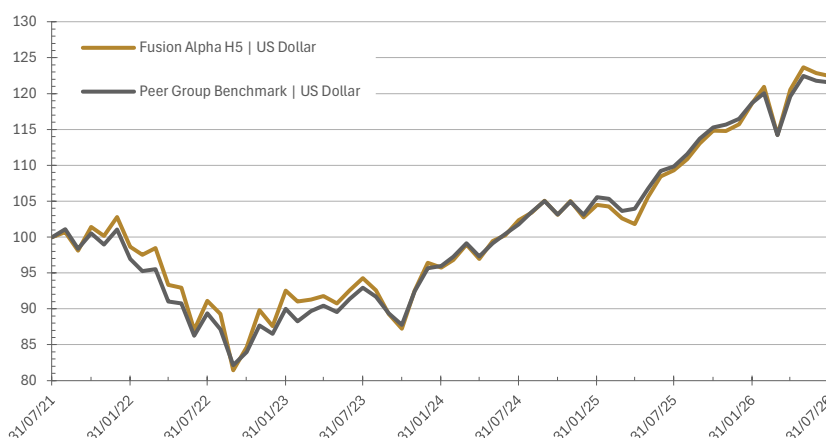
Investment Manager:
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Investment Time Horizon:
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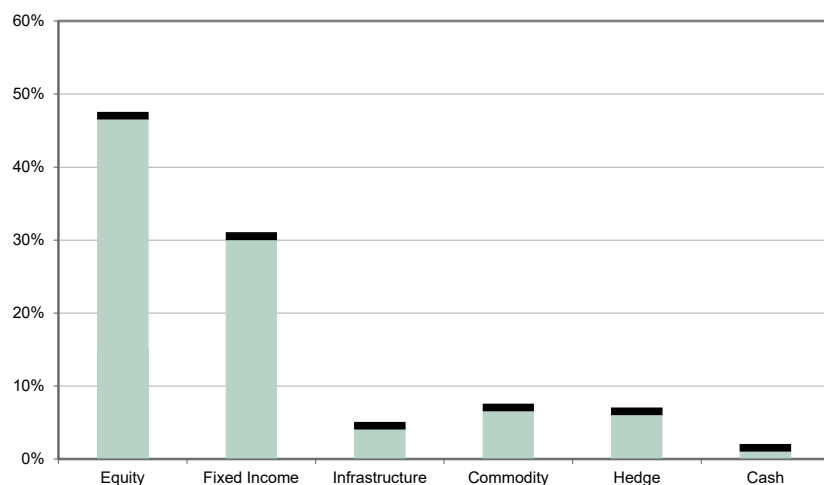
US Dollar Performance*

	Fusion Alpha H5	Peer Group Benchmark
1 mth	-0.3%	-0.2%
3 mths	1.6%	1.7%
6 mths	3.2%	2.4%
1 year	12.0%	10.7%
2 years	19.6%	19.5%
3 years	29.8%	30.8%
5 years	22.4%	21.6%

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

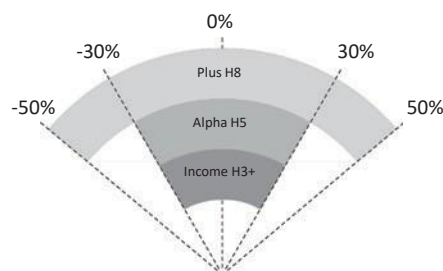


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Fusion Alpha

H5 | Euro

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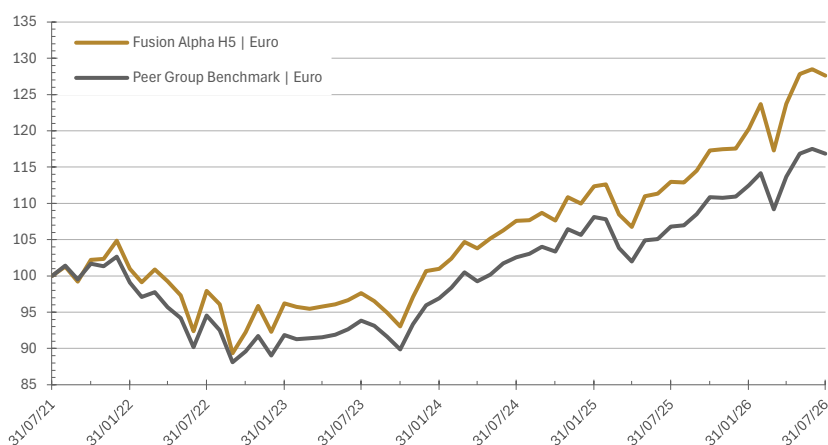
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Investment Time Horizon:
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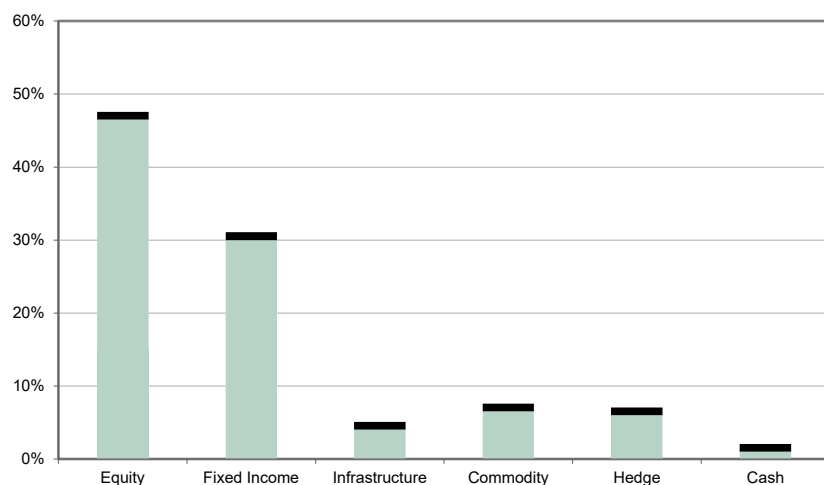
Euro Performance*

	Fusion Alpha H5	Peer Group Benchmark
1 mth	-0.7%	-0.5%
3 mths	3.1%	2.8%
6 mths	6.1%	3.9%
1 year	13.0%	9.4%
2 years	18.6%	13.9%
3 years	30.7%	24.5%
5 years	27.6%	16.9%

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

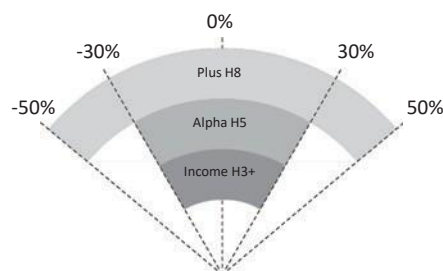


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