Fusion ESG H5 | Sterling

Strategy Overview

The Fusion ESG strategy uses a core and satellite approach of active and passive ESG exposures. The strategy contains active global equity, bond, and alternative managers who have experience managing sustainable mandates in combination with passive broad market indexes that utilise ESG screening to grant broad market exposure with ESG tilts. Asset allocation is aligned to our Fusion Alpha H5 model strategy.

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

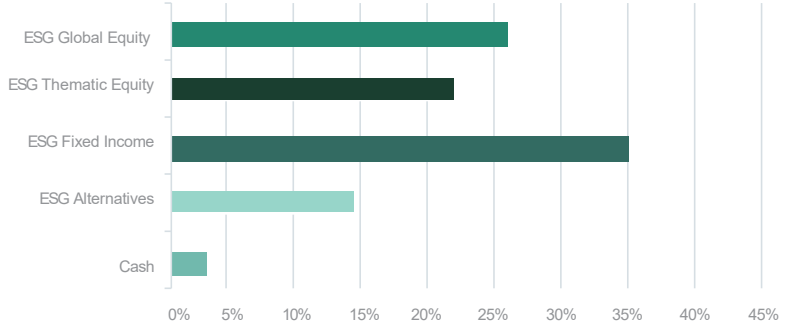
Sterling Performance*

	Fusion ESG H5	Peer Group Benchmark
1mth	-1.2%	-0.5%
3 mths	-0.5%	0.4%
6 mths	0.8%	3.1%
1year	3.1%	5.7%
3 years	26.4%	32.2%
5 years	4.5%	20.6%
10years	41.2%	52.6%

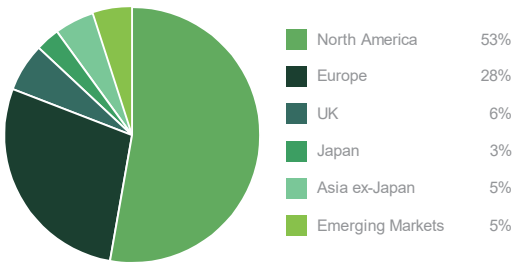
*Fusion ESG H5 Sterling performance is net of fees and is compared to a Peer Group Benchmark.



Asset Allocation



Geographical Equity Asset Allocation



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