

# Future Focused Cautious

## Fund changes - Q1 2025

<i>Original Allocation</i>	<i>New Allocation</i>	<i>Fund name</i>
6	<b>6</b>	abrnd - Ethical Corporate Bond
6	<b>6</b>	Aegon - Ethical Corporate Bond
5	<b>6</b>	AllianceBernstein - Sustainable US Equity
5	<b>5</b>	CT - Responsible UK Equity
4	<b>4</b>	EdenTree - Responsible & Sustainable European Equity
7	<b>7</b>	EdenTree - Responsible & Sustainable Sterling Bond
6	<b>6</b>	Janus Henderson - Global Sustainable Equity
3	<b>3</b>	JPM - Global Macro Sustainable
5	<b>5</b>	Jupiter - Ecology
8	<b>8</b>	Liontrust - Sustainable Future Corporate Bond
4	<b>4</b>	Liontrust - Sustainable Future UK Growth
9	<b>9</b>	Rathbone - Ethical Bond
8	<b>8</b>	Royal London - Short Duration Credit
7	<b>7</b>	Royal London - Short Term Fixed Income
6	<b>6</b>	Royal London - Sustainable Leaders
8	<b>7</b>	Schroder - Global Sustainable Value Equity
3	<b>3</b>	Stewart Investors - Asia Pacific Sustainability

<b>BUY</b>	<b>SELL</b>	<b>INCREASE</b>	<b>DECREASE</b>
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Accepting these fund changes will result in portfolios being updated to reflect the selection above. Where no changes are recommended, a rebalance will occur to restore the correct weightings. In the case of fund suspensions, a cash alternative will be used for new investments and regular premiums and also where it is necessary to bring a portfolio up to 100%.

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