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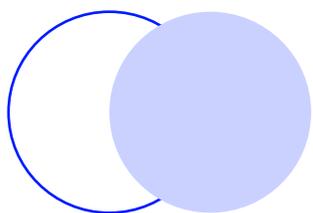
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# **FTSE Private Investor Series**

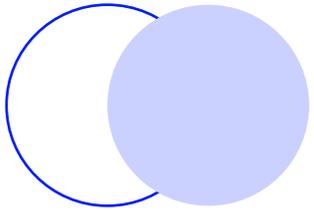
**March 2025 Asset Allocation Review Results**

**Implementation Effective From 24<sup>th</sup> March 2025**



## Asset Allocation Levels (Effective 24<sup>th</sup> March 2025)

Asset Classes (%)	FTSE UK Private Investor Ultra Conservative Index	FTSE UK Private Investor Conservative Index	FTSE UK Private Investor Income Index	FTSE UK Private Investor Balanced Index	FTSE UK Private Investor Growth Index	FTSE UK Private Investor Ultra Growth Index	FTSE UK Private Investor Global Growth Index
UK Government Bond	3.3	8.4	6.6	5.4	3.2		
Sterling Corporate Bond	11.5	5.6	4.1	3.6	2.3		
Global ex UK Bond	76.9	37	25.6	16.5	9.3		
Global Bond						0.1	
Cash	6	9	6.6	5.5	4.6	2.9	
UK Equity		6	9.9	12.9	15.3	16.8	
Global ex UK Equity		27	40.5	50.2	58.4	79.4	
Global Equity	0.2						
Commercial Property		0.1	0.1	0.1			
Other Investment	2.1	6.9	6.6	5.8	6.9	0.8	
Developed Market Equities							84.1
Emerging Market Equities							15.9
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>



## Volatility Ranges of Eligible Morningstar Funds Used for Deriving Asset Allocation Levels

3y Return Volatility Range, Annualised, for all Funds within Eligible Fund Universes	FTSE UK Private Investor Ultra Conservative Index	FTSE UK Private Investor Conservative Index	FTSE UK Private Investor Income Index	FTSE UK Private Investor Balanced Index	FTSE UK Private Investor Growth Index	FTSE UK Private Investor Ultra Growth Index	FTSE UK Private Investor Global Growth Index
Low (%)	0.3	2.1	6.5	7.9	9.3		2.7
Median (%)	4.7	5.6	7.2	8.6	10.3		13.8
High (%)	6.2	6.5	7.9	9.3	16.5		147.6



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