UK wealth managers: business profiles						
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Wealth manager	Total offices in UK, CI and IoM		Number of individual private clients in UK	AUM (£m) within discretionary	AUM (£m) within advisory	AUM (£m) within execution only
			2,060	1,347	230	
Brooks Macdonald	15	113		15,944	-	282
Brown Shipley, a Quintet Private Bank	8	77	12,654	5,816	736	1,400
Canaccord Genuity Wealth Management	15	255	40,379	20,538	3,619	9,026
Cantab Asset Management	2	12	520	440	270	-
Cazenove Capital	9	167	8,000			
Charles Stanley	23	225	32,540	13,327	1,771	2,786
Close Brothers	15	95	26,899	1,580	119	
EFG Harris Allday	4	17	6,908	1,667	470	372
EFG PRIVATE BANK LTD	3	60				
Evelyn Partners	30	591	177,344	46,600	2,700	3,700
Greystone Wealth Management	2	21		-	1,373	-
Investec	15	320	40,000	19,821	725	2,194
IPS Capital LLP	1	7	450	520	68	8
James Hambro & Partners LLP	4	46	2,159	4,132	172	488
JM Finn	5	86	18,500	8,613	735	1,004
Killik & Co	9	86	19,092	2,817	3,930	848
LGT Wealth Management	4	87	17,977	18,900	1,200	1,500
McInroy & Wood Ltd	3	15	830	1,283		
Murdoch Asset Management	1	11	2,663	7	604	12
Nedbank Private Wealth	3	37	6,600	678	-	3,447
Netwealth	1	9				
Quilter Cheviot	15	240	36,000	22,628	309	1,487
Rathbones Group Plc	15	379	54,600	31,400	2,400	800
RBC Brewin Dolphin	31	463	80,000	46,300	1,500	4,700

1,258

6,000

500

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1,828

2,461

4,730

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18

18

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12,521

7,385

5,088

500

5,800

1,560

7,900

1,099

173

677

125

47

3,330

30

317

Rothschild & Co

SG Kleinwort Hambros

Vermeer Partners

WH Ireland Plc

Source: Savanta

Tacit Investment Management

Veritas Investment Partners (UK) Limited

Waverton Investment Management

Ruffer LLP

	Services offered																							
Wealth manager	Access to alternative finance / crowdfunding	Ad visory investment management	Bankl ng	Brokerage	Charity services	Commodi ties	Concierge	Bespoke discretionary investment management	Discretionary model portfolio/fund	Family office services	Hedge funds (including funds of funds)	In-house fund management	Insurance	Mortgages	Offshore services	Online discretionary investment management (aka 'robo-advice')	Online services	Pension & retirement planning	Philanthropic planning	Private equity	Tax planning	Trust & estate planning	Cryptocurrency trading	Succ ession planning
7IM		Х						Х	Х	Х	Х	Х	X	Х		Х	Х	Х	Х	Х	Х	Х		X
Brooks Macdonald					х			Х	Х		Х	Х		Х		Х	Х	Х		Х	Х	Х		Х
Brown Shipley, a Quintet Private Bank		Х	Х					Х			Х		Х			Х	Х			X	Х	Х		X
Canaccord Genuity Wealth Management		х		x	х	Х		Х		Х	х			Х		х	X	Х	Х	Х	Х	х		x
Cantab Asset Management		Х			Х			Х	Х		Х			X		Х	Х	Х	Х	Х	Х	Х		X
Cazenove Capital		Х	х		Х			Х		Х	Х			Х	х	х	Х	Х	Х	x	х	х		X
Charles Stanley		х		х	Х			Х			Х					х	Х	Х		Х	х	х		X
Close Brothers			Х	х	х	Х		Х		x	Х	Х	Х	Х	Х		Х	Х	Х	Х	Х	Х		X
EFG Harris Allday		Х			X			X																
EFG PRIVATE BANK LTD		Х	Х	Х		Х		Х		Х	Х		Х	Х		Х	Х		Х		Х	Х		Х
Evelyn Partners		X		Х	X	X		X	X	Х	Х	Х	X		Х	X	Х	Х	Х	X	Х	Х		X
Greystone Wealth Management		Х									Х											Х		
Investec		X	Х	Х	X			X			Х		Х	X		Х				X	Х	Х		
IPS Capital LLP		Х			Х			Х	Х			Х		Х			Х	Х		Х	Х	Х		X
James Hambro & Partners LLP					X			Х			Х			Х			X				Х	Х		X
JM Finn		Х			Х			Х			Х					Х	Х			Х	Х	Х		х
Killik & Co		Х		X	X			Х	Х	Х				X	Х	Х	Х	Х	Х	Х	Х	Х		X
LGT Wealth Management	х	х			Х			Х	Х	х	Х		х	х	x	х	х	х	х	х	х	х		x
McInroy & Wood Ltd					Х			Х			Х					Х						Х		

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Services offered

Murdoch Asset Management

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Nedbank Private Wealth

Netwealth

Quilter Cheviot

Rathbones Group Plc

RBC Brewin Dolphin

SG Kleinwort Hambros

Vermeer Partners

WH Ireland Plc

Source: Savanta

Tacit Investment Management

Veritas Investment Partners (UK) Limited

Waverton Investment Management

Rothschild & Co

Ruffer LLP

Balanced Portfolio (Typically	35 – 55% equity)							
	Balanced portfolio details							
			Data submitted to ARC for verification	1 year	3 years cumulative	5 years cumulative		
Wealth manager	Name	Product type (Portfolio, Model, Fund, Composite of Portfolios, PCI)	2000	20000	TOCAL T	r g		
7IM	7IM SELECT BALANCED FUND	Fund	Yes	-6.6	5.4			
Brooks Macdonald	BM Medium Risk	Composite of Portfolios	Yes	-11.5	4.3	12.8		
Brown Shipley, a Quintet Private Bank	SVS Brown Shipley Income Fund	Fund	Yes	-14.9	-1.6	4.9		
Cazenove Capital	Cazenove Capital Balanced	Model	Yes	-7.9	7.1	15.7		
Charles Stanley	Dynamic Passive 2	Model	Yes	-9.0	0.7	7.8		
Close Brothers	Close Brothers Balanced Asset Portfolio	PCI	Yes	-8.3	4.0	12.0		
EFG Harris Allday	Balanced Asset	Portfolio	Yes	-7.3	4.6	14.3		
EFG PRIVATE BANK LTD	EFG Global Balanced Strategy	Composite of Portfolios	Yes	-10.2	3.7 5.7	10.8		
Evelyn Partners	Evelyn Partners GBP Balanced PCI	PCI	Yes	-7.7 -14.6	-9.2	-3.9		
Greystone Wealth Management	VT Greystone Cautious Managed Investec Balanced ARC	Fund PCI	No Yes	-9.5	0.3	1000		
Investec IPS Capital LLP	Diversifier IPS MPS GBP	Portfolio	No	10000	4.0	8.1 11.9		
James Hambro & Partners LLP	James Hambro & Partners Balanced Portfolios	1 0 0 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	0.7000	-11.1 -9.7	5.2	95,00000		
JM Finn	Coleman Street Investments – Income and Growth	Composite of Portfolios Fund	Yes No	-13.0	4.0	13.9 15.0		
Killik & Co	Killik Managed Investment Service - Balanced Portfolio	Portfolio	Yes	-9.4	0.8	6.2		
LGT Wealth Management	GBP Global Medium	Model	Yes	-12.1	3.5	11.9		
Murdoch Asset Management	MAM Prudent	Model	No	-12.1	-4.2	8.5		
Nedbank Private Wealth	Nedbank Private Wealth Global Steady Growth	Composite of Portfolios	Yes	-10.0	3.5	13.0		
Netwealth	Netwealth Risk Level 4	PCI	Yes		2.4	9.6		
Rathbones Group Plc	Rathbones Investment Management Ltd	Composite of Portfolios	Yes	-8.1	1.7	7.4		
RBC Brewin Dolphin	BC BD MPS INCOME	Portfolio	Yes	200900	2.3	11.5		
Rothschild & Co	Rothschild & Co Sterling Cautious Composite	Composite of Portfolios	Yes	-7.3	9.7	18.8		
SG Kleinwort Hambros	KH Global Balanced Composite	Model	Yes	-10.0	0.9	10.1		
Tacit Investment Management	Real Return	Portfolio	Yes	-5.4	1.0	7.7		
Veritas Investment Partners (UK) Limited	Veritas GBP Balanced Asset PCI	PCI	Yes	-8.7	19.0	34.7		
Waverton Investment Management	Waverton ARC PCI Balanced	PCI	Yes	-7.4	10.7	19.3		
WH Ireland Pic	Wayfarer 5	Model	Yes	-3.6	2.8	5.8		
TOTAL SECTION OF THE	ortfolios from 100+ leading investment managers to independently verify their performance fig	STATE OF THE PROPERTY OF THE P	163	5.0	2.0	3.0		
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Capital Growth Portfolio (Typ	oically 55-75% equity)							
Capital Growth Portfolio (Typ	pically 55-75% equity) Capital growth portfolio details			% total re	turns net o	of fees		
Capital Growth Portfolio (Typ			ta submitted ARC for ification			portacionari.		
Capital Growth Portfolio (Typ		Product type (Portfolio, Model, Fund, Composite of Portfolios, PCI)	Data submitted to ARC for verification	1 year % total re	3 years cumulative surnt	5 years at the cumulative see		
	Capital growth portfolio details	Product type (Portfolio, Model, Fund, Composite of Portfolios, PCI) Fund	Section 1997			portacionari.		
Wealth manager	Capital growth portfolio details Name	Professional Control of the Control		1 year	3 years cumulative	portacionari.		
Wealth manager 7IM	Capital growth portfolio details Name 7IM SELECT MODERATELY ADVENTUROUS FUND	Fund	Yes	-5.2	3 years cumulative	5 years cumulative		
Wealth manager 7IM Brooks Macdonald	Name 7IM SELECT MODERATELY ADVENTUROUS FUND BM Medium-to-High Risk	Fund Composite of Portfolios	Yes Yes	-5.2 -14.2	3 years cumulative	191 Cumulative		
Wealth manager 7IM Brooks Macdonald Brown Shipley, a Quintet Private Bank	Name 7IM SELECT MODERATELY ADVENTUROUS FUND BM Medium-to-High Risk SVS Brown Shipley Balanced	Fund Composite of Portfolios Fund	Yes Yes Yes	-5.2 -14.2 -17.5	3 years 10.2 6.4	2 years cumulative		
Wealth manager 7IM Brooks Macdonald Brown Shipley, a Quintet Private Bank Cazenove Capital	Capital growth portfolio details Name 7IM SELECT MODERATELY ADVENTUROUS FUND BM Medium-to-High Risk SVS Brown Shipley Balanced Cazenove Capital Growth	Fund Composite of Portfolios Fund Model	Yes Yes Yes Yes	-5.2 -14.2 -17.5 -7.8 -10.1 -9.3	10.2 6.4 -2.1 11.0 8.2 6.4	16.1 6.1 22.1 21.3 16.5		
Wealth manager 7IM Brooks Macdonald Brown Shipley, a Quintet Private Bank Cazenove Capital Charles Stanley Close Brothers EFG Harris Allday	Name 7IM SELECT MODERATELY ADVENTUROUS FUND BM Medium-to-High Risk SVS Brown Shipley Balanced Cazenove Capital Growth Dynamic Passive 4 Close Brothers Steady Growth PCI Diversified Equity	Fund Composite of Portfolios Fund Model Model PCI Portfolio	Yes Yes Yes Yes Yes Yes Yes Yes	-5.2 -14.2 -17.5 -7.8 -10.1 -9.3 -11.3	9 Abers 10.2 6.4 -2.1 11.0 8.2 6.4 2.1	16.1 6.1 22.1 21.3 16.5 12.9		
Wealth manager 7IM Brooks Macdonald Brown Shipley, a Quintet Private Bank Cazenove Capital Charles Stanley Close Brothers EFG Harris Allday EFG PRIVATE BANK LTD	Name 7IM SELECT MODERATELY ADVENTUROUS FUND BM Medium-to-High Risk SVS Brown Shipley Balanced Cazenove Capital Growth Dynamic Passive 4 Close Brothers Steady Growth PCI Diversified Equity EFG Global Growth Strategy	Fund Composite of Portfolios Fund Model Model PCI Portfolio Composite of Portfolios	Yes	-5.2 -14.2 -17.5 -7.8 -10.1 -9.3 -11.3 -11.9	ayers 10.2 6.4 -2.1 11.0 8.2 6.4 2.1 5.5	16.1 6.1 22.1 21.3 16.5 12.9		
Wealth manager 7IM Brooks Macdonald Brown Shipley, a Quintet Private Bank Cazenove Capital Charles Stanley Close Brothers EFG Harris Allday EFG PRIVATE BANK LTD Evelyn Partners	Name 7IM SELECT MODERATELY ADVENTUROUS FUND BM Medium-to-High Risk SVS Brown Shipley Balanced Cazenove Capital Growth Dynamic Passive 4 Close Brothers Steady Growth PCI Diversified Equity EFG Global Growth Strategy Evelyn Partners GBP Steady Growth PCI	Fund Composite of Portfolios Fund Model Model PCI Portfolio Composite of Portfolios PCI	Yes	-5.2 -14.2 -17.5 -7.8 -10.1 -9.3 -11.3 -11.9 -9.5	and a state of the state of th	16.1 6.1 22.1 21.3 16.5 12.9 13.7 17.2		
Wealth manager 7IM Brooks Macdonald Brown Shipley, a Quintet Private Bank Cazenove Capital Charles Stanley Close Brothers EFG Harris Allday EFG PRIVATE BANK LTD Evelyn Partners Greystone Wealth Management	Name 7IM SELECT MODERATELY ADVENTUROUS FUND BM Medium-to-High Risk SVS Brown Shipley Balanced Cazenove Capital Growth Dynamic Passive 4 Close Brothers Steady Growth PCI Diversified Equity EFG Global Growth Strategy Evelyn Partners GBP Steady Growth PCI VT Greystone Balanced Managed	Fund Composite of Portfolios Fund Model Model PCI Portfolio Composite of Portfolios PCI Fund	Yes	-5.2 -14.2 -17.5 -7.8 -10.1 -9.3 -11.3 -11.9 -9.5 -15.6	10.2 6.4 -2.1 11.0 8.2 6.4 2.1 5.5 6.7 -6.3	16.1 6.1 22.1 21.3 16.5 12.9 13.7 17.2 1.3		
Wealth manager 7IM Brooks Macdonald Brown Shipley, a Quintet Private Bank Cazenove Capital Charles Stanley Close Brothers EFG Harris Allday EFG PRIVATE BANK LTD Evelyn Partners Greystone Wealth Management Investec	Name 7IM SELECT MODERATELY ADVENTUROUS FUND BM Medium-to-High Risk SVS Brown Shipley Balanced Cazenove Capital Growth Dynamic Passive 4 Close Brothers Steady Growth PCI Diversified Equity EFG Global Growth Strategy Evelyn Partners GBP Steady Growth PCI VT Greystone Balanced Managed Investec Steady Growth ARC	Fund Composite of Portfolios Fund Model Model PCI Portfolio Composite of Portfolios PCI Fund PCI	Yes	-5.2 -14.2 -17.5 -7.8 -10.1 -9.3 -11.3 -11.9 -9.5 -15.6 -10.2	and a state of the	16.1 6.1 22.1 21.3 16.5 12.9 13.7 17.2 1.3 12.8		
Wealth manager 7IM Brooks Macdonald Brown Shipley, a Quintet Private Bank Cazenove Capital Charles Stanley Close Brothers EFG Harris Allday EFG PRIVATE BANK LTD Evelyn Partners Greystone Wealth Management Investec James Hambro & Partners LLP	Name 7IM SELECT MODERATELY ADVENTUROUS FUND BM Medium-to-High Risk SVS Brown Shipley Balanced Cazenove Capital Growth Dynamic Passive 4 Close Brothers Steady Growth PCI Diversified Equity EFG Global Growth Strategy Evelyn Partners GBP Steady Growth PCI VT Greystone Balanced Managed Investec Steady Growth ARC James Hambro & Partners Steady Growth Portfolios	Fund Composite of Portfolios Fund Model Model PCI Portfolio Composite of Portfolios PCI Fund PCI Composite of Portfolios	Yes	-5.2 -14.2 -17.5 -7.8 -10.1 -9.3 -11.3 -11.9 -9.5 -15.6 -10.2 -9.8	aytenno 10.2 6.4 -2.1 11.0 8.2 6.4 2.1 5.5 6.7 -6.3 3.4 7.4	16.1 6.1 22.1 21.3 16.5 12.9 13.7 17.2 1.3 12.8 17.8		
Wealth manager 7IM Brooks Macdonald Brown Shipley, a Quintet Private Bank Cazenove Capital Charles Stanley Close Brothers EFG Harris Allday EFG PRIVATE BANK LTD Evelyn Partners Greystone Wealth Management Investec James Hambro & Partners LLP KIllik & Co	Name 7IM SELECT MODERATELY ADVENTUROUS FUND BM Medium-to-High Risk SVS Brown Shipley Balanced Cazenove Capital Growth Dynamic Passive 4 Close Brothers Steady Growth PCI Diversified Equity EFG Global Growth Strategy Evelyn Partners GBP Steady Growth PCI VT Greystone Balanced Managed Investec Steady Growth ARC James Hambro & Partners Steady Growth Portfolios Killik Managed Investment Service - Steady Growth Portfolio	Fund Composite of Portfolios Fund Model Model PCI Portfolio Composite of Portfolios PCI Fund PCI Composite of Portfolios PCI Fund PCI Composite of Portfolios Portfolio	Yes	-5.2 -14.2 -17.5 -7.8 -10.1 -9.3 -11.3 -11.9 -9.5 -15.6 -10.2 -9.8 -12.4	avigate of the state of the sta	16.1 6.1 22.1 21.3 16.5 12.9 13.7 17.2 1.3 12.8 17.8		
Wealth manager 7IM Brooks Macdonald Brown Shipley, a Quintet Private Bank Cazenove Capital Charles Stanley Close Brothers EFG Harris Allday EFG PRIVATE BANK LTD Evelyn Partners Greystone Wealth Management Investec James Hambro & Partners LLP Killik & Co LGT Wealth Management	Name 7IM SELECT MODERATELY ADVENTUROUS FUND BM Medium-to-High Risk SVS Brown Shipley Balanced Cazenove Capital Growth Dynamic Passive 4 Close Brothers Steady Growth PCI Diversified Equity EFG Global Growth Strategy Evelyn Partners GBP Steady Growth PCI VT Greystone Balanced Managed Investec Steady Growth ARC James Hambro & Partners Steady Growth Portfolios Killik Managed Investment Service - Steady Growth Portfolio GBP Global Medium High	Fund Composite of Portfolios Fund Model Model PCI Portfolio Composite of Portfolios PCI Fund PCI Composite of Portfolios PCI Model	Yes	-5.2 -14.2 -17.5 -7.8 -10.1 -9.3 -11.3 -11.9 -9.5 -15.6 -10.2 -9.8 -12.4 -13.6	10.2 6.4 -2.1 11.0 8.2 6.4 2.1 5.5 6.7 -6.3 3.4 7.4 5.2 8.9	16.1 6.1 22.1 21.3 16.5 12.9 13.7 17.2 1.3 12.8 17.8 13.1 21.9		
Wealth manager 7IM Brooks Macdonald Brown Shipley, a Quintet Private Bank Cazenove Capital Charles Stanley Close Brothers EFG Harris Allday EFG PRIVATE BANK LTD Evelyn Partners Greystone Wealth Management Investec James Hambro & Partners LLP Killik & Co LGT Wealth Management McInroy & Wood Ltd	Name 7IM SELECT MODERATELY ADVENTUROUS FUND BM Medium-to-High Risk SVS Brown Shipley Balanced Cazenove Capital Growth Dynamic Passive 4 Close Brothers Steady Growth PCI Diversified Equity EFG Global Growth Strategy Evelyn Partners GBP Steady Growth PCI VT Greystone Balanced Managed Investec Steady Growth ARC James Hambro & Partners Steady Growth Portfolios Killik Managed Investment Service - Steady Growth Portfolio GBP Global Medium High McInroy & Wood Balanced Fund	Fund Composite of Portfolios Fund Model Model PCI Portfolio Composite of Portfolios PCI Fund PCI Composite of Portfolios PCI Fund PCI Composite of Portfolios Portfolio	Yes	-5.2 -14.2 -17.5 -7.8 -10.1 -9.3 -11.3 -11.9 -9.5 -15.6 -10.2 -9.8 -12.4 -13.6 -4.2	9 Ayes and 10.2 6.4 -2.1 11.0 8.2 6.4 2.1 5.5 6.7 -6.3 3.4 7.4 5.2 8.9 19.3	16.1 6.1 22.1 21.3 16.5 12.9 13.7 17.2 1.3 12.8 17.8 13.1 21.9 31.1		
Wealth manager 7IM Brooks Macdonald Brown Shipley, a Quintet Private Bank Cazenove Capital Charles Stanley Close Brothers EFG Harris Allday EFG PRIVATE BANK LTD Evelyn Partners Greystone Wealth Management Investec James Hambro & Partners LLP Killik & Co LGT Wealth Management McInroy & Wood Ltd Murdoch Asset Management	Name 7IM SELECT MODERATELY ADVENTUROUS FUND BM Medium-to-High Risk SVS Brown Shipley Balanced Cazenove Capital Growth Dynamic Passive 4 Close Brothers Steady Growth PCI Diversified Equity EFG Global Growth Strategy Evelyn Partners GBP Steady Growth PCI VT Greystone Balanced Managed Investec Steady Growth ARC James Hambro & Partners Steady Growth Portfolios Killik Managed Investment Service - Steady Growth Portfolio GBP Global Medium High McInroy & Wood Balanced Fund MAM Balanced	Fund Composite of Portfolios Fund Model Model PCI Portfolio Composite of Portfolios PCI Fund PCI Composite of Portfolios PCI Fund PCI Composite of Portfolios Portfolio Model Fund Model	Yes	-5.2 -14.2 -17.5 -7.8 -10.1 -9.3 -11.3 -11.9 -9.5 -15.6 -10.2 -9.8 -12.4 -13.6 -4.2 -13.6	aytennum 10.2 6.4 -2.1 11.0 8.2 6.4 2.1 5.5 6.7 -6.3 3.4 7.4 5.2 8.9 19.3 0.8	16.1 6.1 22.1 21.3 16.5 12.9 13.7 17.2 1.3 12.8 17.8 13.1 21.9 31.1		
Wealth manager 7IM Brooks Macdonald Brown Shipley, a Quintet Private Bank Cazenove Capital Charles Stanley Close Brothers EFG Harris Allday EFG PRIVATE BANK LTD Evelyn Partners Greystone Wealth Management Investec James Hambro & Partners LLP KIllik & Co LGT Wealth Management McInroy & Wood Ltd Murdoch Asset Management Nedbank Private Wealth	Name 7IM SELECT MODERATELY ADVENTUROUS FUND BM Medium-to-High Risk SVS Brown Shipley Balanced Cazenove Capital Growth Dynamic Passive 4 Close Brothers Steady Growth PCI Diversified Equity EFG Global Growth Strategy Evelyn Partners GBP Steady Growth PCI VT Greystone Balanced Managed Investec Steady Growth ARC James Hambro & Partners Steady Growth Portfolios Killik Managed Investment Service - Steady Growth Portfolio GBP Global Medium High McInroy & Wood Balanced Fund MAM Balanced Nedbank Private Wealth Global Growth	Fund Composite of Portfolios Fund Model Model PCI Portfolio Composite of Portfolios PCI Fund PCI Composite of Portfolios Portfolio Model Fund Model Fund Model Fund Model Fund Model Composite of Portfolios	Yes	-5.2 -14.2 -17.5 -7.8 -10.1 -9.3 -11.3 -11.9 -9.5 -15.6 -10.2 -9.8 -12.4 -13.6 -4.2 -13.6 -10.4	10.2 6.4 -2.1 11.0 8.2 6.4 2.1 5.5 6.7 -6.3 3.4 7.4 5.2 8.9 19.3 0.8 6.1	16.1 6.1 22.1 21.3 16.5 12.9 13.7 17.2 1.3 12.8 17.8 13.1 21.9 31.1 13.7 17.3		
Wealth manager 7IM Brooks Macdonald Brown Shipley, a Quintet Private Bank Cazenove Capital Charles Stanley Close Brothers EFG Harris Allday EFG PRIVATE BANK LTD Evelyn Partners Greystone Wealth Management Investec James Hambro & Partners LLP Killik & Co LGT Wealth Management McInroy & Wood Ltd Murdoch Asset Management Nedbank Private Wealth Netwealth	Name 7IM SELECT MODERATELY ADVENTUROUS FUND BM Medium-to-High Risk SVS Brown Shipley Balanced Cazenove Capital Growth Dynamic Passive 4 Close Brothers Steady Growth PCI Diversified Equity EFG Global Growth Strategy Evelyn Partners GBP Steady Growth PCI VT Greystone Balanced Managed Investec Steady Growth ARC James Hambro & Partners Steady Growth Portfolios Killik Managed Investment Service - Steady Growth Portfolio GBP Global Medium High McInroy & Wood Balanced Fund MAM Balanced Nedbank Private Wealth Global Growth Netwealth Risk Level 6	Fund Composite of Portfolios Fund Model Model PCI Portfolio Composite of Portfolios PCI Fund PCI Composite of Portfolios Portfolio Composite of Portfolios Portfolio Composite of Portfolios Portfolio Model Fund Model Composite of Portfolios PCI	Yes	-5.2 -14.2 -17.5 -7.8 -10.1 -9.3 -11.3 -11.9 -9.5 -15.6 -10.2 -9.8 -12.4 -13.6 -4.2 -13.6 -10.4 -7.4	10.2 6.4 -2.1 11.0 8.2 6.4 2.1 5.5 6.7 -6.3 3.4 7.4 5.2 8.9 19.3 0.8 6.1 7.8	16.1 6.1 22.1 21.3 16.5 12.9 13.7 17.2 1.3 12.8 17.8 13.1 21.9 31.1 13.7 17.3 16.9		
Wealth manager 7IM Brooks Macdonald Brown Shipley, a Quintet Private Bank Cazenove Capital Charles Stanley Close Brothers EFG Harris Allday EFG PRIVATE BANK LTD Evelyn Partners Greystone Wealth Management Investec James Hambro & Partners LLP Killik & Co LGT Wealth Management McInroy & Wood Ltd Murdoch Asset Management Nedbank Private Wealth Netwealth Rathbones Group Plc	Name 7IM SELECT MODERATELY ADVENTUROUS FUND BM Medium-to-High Risk SVS Brown Shipley Balanced Cazenove Capital Growth Dynamic Passive 4 Close Brothers Steady Growth PCI Diversified Equity EFG Global Growth Strategy Evelyn Partners GBP Steady Growth PCI VT Greystone Balanced Managed Investec Steady Growth ARC James Hambro & Partners Steady Growth Portfolios Killik Managed Investment Service - Steady Growth Portfolio GBP Global Medium High McInroy & Wood Balanced Fund MAM Balanced Nedbank Private Wealth Global Growth Netwealth Risk Level 6 Rathbones Investment Management Ltd	Fund Composite of Portfolios Fund Model Model PCI Portfolio Composite of Portfolios PCI Fund PCI Composite of Portfolios Portfolio Composite of Portfolios Portfolio Portfolio Portfolio Model Fund Model Composite of Portfolios PCI Composite of Portfolios	Yes	-5.2 -14.2 -17.5 -7.8 -10.1 -9.3 -11.3 -11.9 -9.5 -15.6 -10.2 -9.8 -12.4 -13.6 -4.2 -13.6 -10.4 -7.4 -10.5	10.2 6.4 -2.1 11.0 8.2 6.4 2.1 5.5 6.7 -6.3 3.4 7.4 5.2 8.9 19.3 0.8 6.1 7.8 5.1	16.1 6.1 22.1 21.3 16.5 12.9 13.7 17.2 1.3 12.8 17.8 13.1 21.9 31.1 13.7 17.3 16.9 14.6		
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