

Researched Fund Panel for the Aegon Website (by IA sector)

Count	Fund Sector/Fund Manager	Fund Name	IA Sector	Morningstar Analyst Rating
Update: 17-May-19				
5	Asia Pacific Ex Japan	5		
1	Fidelity	Asia	Asia Pacific ex Japan	Bronze
1	First State	Asia Focus	Asia Pacific Ex Japan	Gold
1	Schroder	Asian Alpha Plus	Asia Pacific Ex Japan	Silver
1	Schroder	Asian Income	Asia Pacific Ex Japan	Silver
1	Stewart Investors	Asia Pacific Leaders	Asia Pacific Ex Japan	Silver
1	China/Greater China	1		
1	Janus Henderson	China Opportunities	China/Greater China	Bronze
4	Europe Ex UK	4		
1	BlackRock	Continental European Income	Europe Ex UK	Bronze
1	FP Crux	European Special Situations	Europe Ex UK	Bronze
1	Jupiter	European Special Situations	Europe Ex UK	Silver
1	Schroder	European	Europe Ex UK	Silver
1	European Smaller Companies	1		
1	Barings	Europe Select Trust	European Smaller Companies	Silver
1	Flexible Investment	1		
1	Jupiter	Merlin Growth Portfolio	Flexible Investment	Bronze
9	Global	9		
1	BNY Mellon	Long Term Global Equity	Global	Silver
1	Dodge & Cox Worldwide	Global Stock	Global	Gold
1	Fidelity	Global Special Situations	Global	Silver
1	First State	Global Listed Infrastructure	Global	Bronze
1	Fundsmith	Equity	Global	Gold
1	Jupiter	Ecology	Global	Bronze
1	M&G	Global Dividend	Global	Silver
1	Rathbone	Global Opportunities	Global	Silver
1	Standard Life	Global Smaller Companies	Global	Bronze
2	Global Bonds	2		
1	M&G	Global Macro Bond	Global Bonds	Silver
1	Newton	International Bond	Global Bonds	Bronze
4	Global Emerging Markets	4		
1	Capital Group	New World	Global Emerging Markets	Gold
1	Fidelity	Emerging Markets	Global Emerging Markets	Silver
1	JPMorgan	Emerging Markets	Global Emerging Markets	Silver
1	Lazard	Emerging Markets	Global Emerging Markets	Silver
1	Global Equity Income	1		
1	Artemis	Global Income	Global Equity Income	Bronze
3	Japan	3		
1	Man GLG	Japan Core Alpha	Japan	Gold
1	Lindsell Train	Japanese Equity	Japan	Silver
1	Capital Group	Japan Equity	Japan	Bronze
3	Mixed Investment 0-35% Shares	3		
1	LF Miton	Defensive Multi Asset	Mixed Investment 0-35% Shares	Bronze
1	Jupiter	Merlin Conservative Portfolio	Mixed Investment 0-35% Shares	Bronze
1	Royal London	Sustainable Managed Growth	Mixed Investment 0-35% Shares	Bronze
3	Mixed Investment 40-85% Shares	3		
1	Jupiter	Merlin Balanced Portfolio	Mixed Investment 40-85% Shares	Bronze
1	Premier	Multi Asset Growth & Income	Mixed Investment 40-85% Shares	Bronze
1	Royal London	Sustainable World	Mixed Investment 40-85% Shares	Bronze
5	Mixed Investment 20-60% Shares	5		
1	Invesco	Distribution UK	Mixed Investment 20-60% Shares	Bronze
1	Investec	Cautious Managed	Mixed Investment 20-60% Shares	Silver
1	JPMorgan	Multi Asset Income	Mixed Investment 20-60% Shares	Bronze
1	Jupiter	Merlin Income Portfolio	Mixed Investment 20-60% Shares	Bronze
1	Royal London	Sustainable Diversified	Mixed Investment 20-60% Shares	Bronze
6	North America	6		
1	Artemis	US Select	North America	Bronze
1	Dodge & Cox Worldwide	US Stock	North America	Gold
1	Fidelity	American Special Situations	North America	Bronze
1	JPMorgan	US Equity Income	North America	Silver
1	Merian	North American Equity	North America	Silver
1	Schroder	US Mid Cap	North America	Bronze
1	North American Smaller Companies	1		
1	Legg Mason Royce	US Small Cap Opportunities	North American Smaller Companies	Bronze
2	Property	2		
1	M&G	Feeder of Property Portfolio	Property	NR
1	Threadneedle	UK Property Authorised Trust	Property	NR
1	Short Term Money Market	1		
1	JPMorgan	Sterling Liquidity	Short Term Money Market	NR
1	Specialist	1		
1	BlackRock	Gold & General	Specialist	Silver
5	Sterling Corporate Bond	5		
1	Fidelity	Moneybuilder Income	Sterling Corporate Bond	Silver
1	Invesco	Corporate Bond UK	Sterling Corporate Bond	Gold
1	iShares	Corporate Bond Index (UK)	Sterling Corporate Bond	Bronze
1	M&G	Strategic Corporate Bond	Sterling Corporate Bond	Silver
1	Royal London	Corporate Bond	Sterling Corporate Bond	Silver

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2	Sterling High Yield	2		
1	M&G	Global High Yield Bond	Sterling High Yield	Bronze
1	Threadneedle	High Yield Bond	Sterling High Yield	Bronze
4	Sterling Strategic Bond	4		
1	Artemis	Strategic Bond	Sterling Strategic Bond	Silver
1	Invesco	Monthly Income Plus UK	Sterling Strategic Bond	Silver
1	Janus Henderson	Preference & Bond	Sterling Strategic Bond	Silver
1	M&G	Optimal Income	Sterling Strategic Bond	Silver
3	Targeted Absolute Return	3		
1	Absolute Insight	Equity Market Neutral	Targeted Absolute Return	Bronze
1	Janus Henderson	UK Absolute Return	Targeted Absolute Return	Bronze
1	Newton	Real Return	Targeted Absolute Return	Silver
9	UK All Companies	9		
1	BlackRock	UK	UK All Companies	Bronze
1	Investec	UK Alpha	UK All Companies	Bronze
1	Investec	UK Special Situations	UK All Companies	Silver
1	Jupiter	UK Special Situations	UK All Companies	Silver
1	Kames	Ethical Equity	UK All Companies	Bronze
1	LF Lindsell Train	UK Equity	UK All Companies	Gold
1	Liontrust	Special Situations	UK All Companies	Bronze
1	Man GLG	Undervalued Assets	UK All Companies	Silver
1	Merian	UK Alpha	UK All Companies	Silver
6	UK Equity Income	6		
1	Artemis	Income	UK Equity Income	Bronze
1	Fidelity	Moneybuilder Dividend	UK Equity Income	Bronze
1	Royal London	UK Equity Income	UK Equity Income	Silver
1	Schroder	Income	UK Equity Income	Bronze
1	Threadneedle	UK Equity Income	UK Equity Income	Silver
1	Troy Trojan	Income	UK Equity Income	Silver
2	UK Gilt	2		
1	Allianz	Gilt Yield	UK Gilt	Bronze
1	Royal London	UK Government Bond	UK Gilt	Bronze
4	UK Smaller Companies	4		
1	Artemis	UK Smaller Companies	UK Smaller Companies	Silver
1	Franklin	UK Smaller Companies	UK Smaller Companies	Bronze
1	Merian	UK Smaller Companies	UK Smaller Companies	Gold
1	Standard Life	UK Smaller Companies	UK Smaller Companies	Gold

Total number of funds 88

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