

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

Update:	22-May-18			
Count	Fund Sector/Fund Manager	Fund Name	IA Sector	Morningstar Analyst Rating
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	Under Review
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	Baring	Europe Select Trust	European Smaller Companies	Silver
1	Flexible Investment	1		
1	Jupiter	Merlin Growth Portfolio	Flexible Investment	Silver
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	Invesco Perpetual	Global Bond	Global Bonds	Bronze
1	Newton	International Bond	Global Bonds	Bronze
5	Global Emerging Markets	5		
1	Fidelity	Emerging Markets	Global Emerging Markets	Bronze
1	JPMorgan	Emerging Markets	Global Emerging Markets	Bronze
1	Lazard	Emerging Markets	Global Emerging Markets	Silver
1	M&G	Global Emerging Markets	Global Emerging Markets	Bronze
1	MI Somerset	Emerging Markets Dividend Growth	Global Emerging Markets	Bronze
1	Global Emerging Markets Bond	1		
1	Pictet	Global Emerging Debt	Global Emerging Markets Bond	Under Review
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	Schroder	Tokyo	Japan	Gold
2	Mixed Investment 0-35% Shares	2		
1	LF Miton	Defensive Multi Asset	Mixed Investment 0-35% Shares	Bronze
1	Jupiter	Merlin Conservative Portfolio	Mixed Investment 0-35% Shares	Bronze
2	Mixed Investment 40-85% Shares	2		
1	Jupiter	Merlin Balanced Portfolio	Mixed Investment 40-85% Shares	Silver
1	Premier	Multi Asset Growth & Income	Mixed Investment 40-85% Shares	Bronze
4	Mixed Investment 20-60% Shares	4		
1	Invesco Perpetual	Distribution	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	Silver
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	Old Mutual	North American Equity	North America	Silver
1	Schroder	US Mid Cap	North America	Silver
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
3	Specialist	3		
1	Aberdeen	Latin America Equity	Specialist	Bronze
1	BlackRock	Gold & General	Specialist	Silver
1	JPMorgan	Natural Resources	Specialist	Bronze

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6	Sterling Corporate Bond	6		
1	Fidelity	Moneybuilder Income	Sterling Corporate Bond	Gold
1	Invesco Perpetual	Corporate Bond	Sterling Corporate Bond	Gold
1	Kames	Ethical Corporate Bond	Sterling Corporate Bond	Bronze
1	Kames	Investment Grade Bond	Sterling Corporate Bond	Silver
1	M&G	Strategic Corporate Bond	Sterling Corporate Bond	Silver
1	Royal London	Corporate Bond	Sterling Corporate Bond	Silver
2	Sterling High Yield	2		
1	Kames	High Yield Bond	Sterling High Yield	Neutral
1	Threadneedle	High Yield Bond	Sterling High Yield	Bronze
5	Sterling Strategic Bond	5		
1	Artemis	Strategic Bond	Sterling Strategic Bond	Silver
1	Fidelity	Strategic Bond	Sterling Strategic Bond	Silver
1	Invesco Perpetual	Monthly Income Plus	Sterling Strategic Bond	Silver
1	Janus Henderson	Preference & Bond	Sterling Strategic Bond	Silver
1	M&G	Optimal Income	Sterling Strategic Bond	Silver
4	Targeted Absolute Return	4		
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
1	Standard Life	Global Absolute Return Strategies	Targeted Absolute Return	Bronze
10	UK All Companies	10		
1	Artemis	UK Special Situations	UK All Companies	Bronze
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	Liontrust	Special Situations	UK All Companies	Bronze
1	Man GLG	Undervalued Assets	UK All Companies	Silver
1	Old Mutual	UK Alpha	UK All Companies	Silver
1	Schroder	Income	UK Equity Income	Bronze
6	UK Equity Income	6		
1	Artemis	Income	UK Equity Income	Bronze
1	LF Woodford	Equity Income	UK Equity Income	Silver
1	Fidelity	Moneybuilder Dividend	UK Equity Income	Bronze
1	Royal London	UK Equity Income	UK Equity Income	Silver
1	Threadneedle	UK Equity Income	UK Equity Income	Silver
1	Troy Trojan	Income	UK Equity Income	Silver
1	UK Gilt	1		
1	Royal London	UK Government Bond	UK Gilt	Bronze
5	UK Smaller Companies	5		
1	Aberforth	UK Small Companies	UK Smaller Companies	Silver
1	Artemis	UK Smaller Companies	UK Smaller Companies	Silver
1	Franklin	UK Smaller Companies	UK Smaller Companies	Bronze
1	Old Mutual	UK Smaller Companies	UK Smaller Companies	Gold
1	Standard Life	UK Smaller Companies	UK Smaller Companies	Silver

Total number of funds 93

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