

GreenSky Wealth 20-60% November 2018

Portfolio Objective

GreenSky Wealth Model Portfolios are diversified investment portfolios designed to provide long term returns. They maintain a global investment outlook over multi asset classes in order to provide long term growth in capital and income, and are risk weighted according client requirements. The aim is to achieve superior absolute returns through the application of traditional, fundamental and value investment principles.

GreenSky Wealth Ltd. is an independent, portfolio management and financial advisory group, established in December 2009 and majority owned by its directors and employees.

Portfolio Commentary

The volatility seen in October continued into November, with trade tensions, interest rates, Brexit and the Italian budget featuring high on market influences, a plunging Oil price also added to concerns. However, Fed Chair Powell's comments that US interest rates are only just below neutral encouraged a late month rally. The portfolio enjoyed a 0.41% increase outperforming it's benchmark.

Cumulative Performance Since Inception

5th December 2012

+ 65.09%	GreenSky 20-60%
+ 34.29%	UT Mixed Investment 20-60% shares

Source: Financial Express (Using bid to bid market value, total return, as at 30th November 2018)

Past performance is not a guide to future performance. The value of investments and the income from them may go down as well as up and investors may not get back the full amount of their original investment.

Monthly Performance November 2018

+0.41%	GreenSky 20-60%
-0.02%	UT Mixed Investment 20-60% shares

Source: Financial Express (Using bid to bid market value, total return, as at 30th November 2018)

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GreenSky 20-60% - Since Inception 5th December 2012

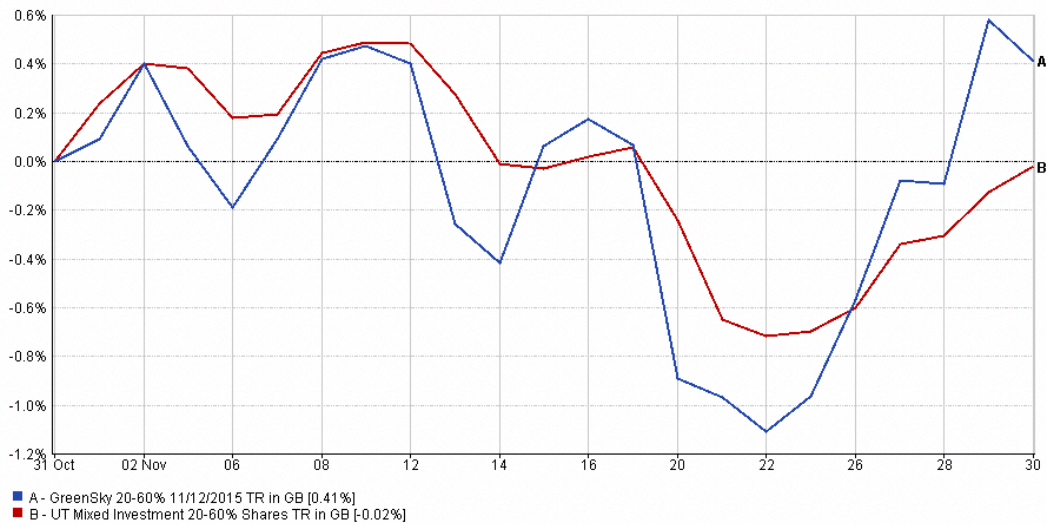
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05/12/2012 - 30/11/2018 Data from FE 2018

GreenSky 20-60% - November 2018

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31/10/2018 - 30/11/2018 Data from FE 2018

Portfolio Breakdown

Source: Financial Express as at 30th November 2018

BHFWorld	GreenSky 40-85%	GreenSky 20-60%	GreenSky 0-35%
UK Equities 31.27	UK Equities 21.47	Global Fixed Interest 14.92	Global Fixed Interest 27.29
North America Equity 38.83	North America Equity 28.76	UK Equities 17.93	Property 14.56
Europe Equities 20.63	European Equities 18.64	European Equities 17.96	UK Equities 14.07
Other Int'l Equities 0.75	Global Fixed Interest 11.10	North American Equities 21.37	North American Equities 13.66
Money Market 2.94	Property 6.60	Property 10.08	European Equities 10.18
Japanese Equities 1.27	Asia Pacific Equities 3.09	Money Market 4.52	Money Market 4.52
Asia Pacific Equities 0.54	Money Market 3.13	Undisclosed 5.69	Undisclosed 6.07
Asia Pacific EM Equities 0.15	UK Fixed Interest 1.25	UK Fixed Interest 4.08	UK Fixed Interest 6.74
European Emerging Equity 0.14	Undisclosed 1.53	Japanese Equities 1.43	Asia Pacific Equities 0.59
	Others 4.43	Others 2.02	Others 1.88

Contact Details

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