

GreenSky Wealth 20-60% December 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

December proved to be another volatile month for markets, with strong losses seen across the board in equities. The risk off attitude prevailing at the moment have their origins in familiar market issues, such as trade tensions, interest rate worries, Brexit, low growth rates in Europe, and a weak Oil price. Government bonds continued to rally as a consequence. The Fed increased US interest rates by 25 bps as expected. The portfolio underperformed its benchmark on the month showing a loss of 3.74%

Cumulative Performance Since Inception

5th December 2012

+ 58.92%	GreenSky 20-60%
+ 30.90%	UT Mixed Investment 20-60% shares

Source: Financial Express (Using bid to bid market value, total return, as at 31st December 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 December 2018

-2.54%	UT Mixed Investment 20-60% shares
-3.74%	GreenSky 20-60%

Source: Financial Express (Using bid to bid market value, total return, as at 31st December 2018)

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

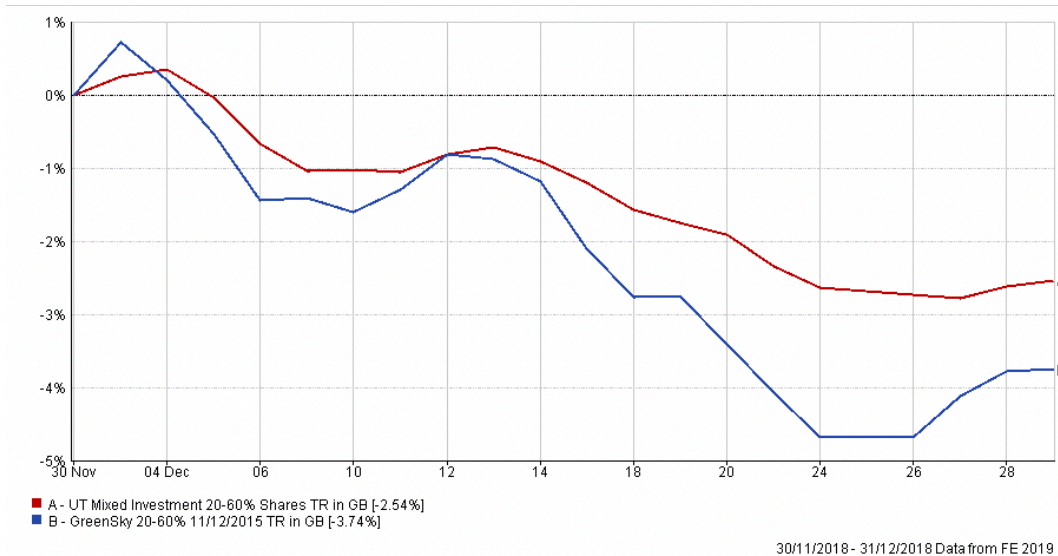
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05/12/2012 - 31/12/2018 Data from FE 2019

GreenSky 20-60% - December 2018

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Portfolio Breakdown

Source: Financial Express as at 31st December 2018

BHFWorld	GreenSky 40-85%	GreenSky 20-60%	GreenSky 0-35%
UK Equities 31.83	UK Equities 21.32	Global Fixed Interest 15.50	Global Fixed Interest 28.29
North America Equity 38.14	North America Equity 28.04	UK Equities 18.01	Property 14.97
Europe Equities 20.57	European Equities 18.45	European Equities 19.17	UK Equities 13.94
Other Int'l Equities 0.74	Global Fixed Interest 11.27	North American Equities 20.87	North American Equities 13.24
Money Market 3.04	Property 6.98	Property 10.53	European Equities 10.44
Japanese Equities 1.25	Asia Pacific Equities 3.20	Money Market 4.48	Money Market 6.88
Asia Pacific Equities 0.54	Money Market 3.16	Undisclosed 1.70	Undisclosed 1.78
Asia Pacific EM Equities 0.15	UK Fixed Interest 1.32	UK Fixed Interest 4.24	UK Fixed Interest 6.75
European Emerging Equity 0.15	Undisclosed 1.61	Japanese Equities 1.37	Asia Pacific Equities 0.68
	Others 4.65	Others 1.30	Others 0.68

Contact Details

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