

GreenSky Wealth 20-60% March 2019

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 markets enjoyed another month of positive returns, notwithstanding a mid-month wobble when recession fears abounded after the inversion of the US yield curve out to 10 years. Bond markets saw gains on the back of this and the 10 Bund dipped into negative yield territory for a short time. There are positive comments coming from officials concerning US/China trade talks, which helped support the market. The Portfolio saw a 1.98% increase in the month

Cumulative Performance Since Inception

5th December 2012

+ 69.79%	GreenSky 20-60%
+ 37.31%	UT Mixed Investment 20-60% shares

Source: Financial Express (Using bid to bid market value, total return, as at 31st March 2019)

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 March 2019

+ 1.98%	GreenSky 20-60%
+ 1.22%	UT Mixed Investment 20-60% shares

Source: Financial Express (Using bid to bid market value, total return, as at 31st March 2019)

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

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05/12/2012 - 29/03/2019 Data from FE 2019

GreenSky 20-60% - March 2019

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28/02/2019 - 29/03/2019 Data from FE 2019

Portfolio Breakdown

Source: Financial Express as at 31st March 2019

BHFWorld	GreenSky 40-85%	GreenSky 20-60%	GreenSky 0-35%
UK Equities 31.95	UK Equities 22.56	Global Fixed Interest 14.72	Global Fixed Interest 28.64
North America Equity 41.30	North America Equity 30.79	UK Equities 18.41	Property 16.38
Europe Equities 21.14	European Equities 18.40	European Equities 19.03	UK Equities 15.44
Other Int'l Equities 0.55	Global Fixed Interest 8.65	North American Equities 21.87	North American Equities 9.99
Money Market 2.75	Property 6.64	Property 10.07	European Equities 9.58
Japanese Equities 1.21	Asia Pacific Equities 3.19	Money Market 5.73	Money Market 6.85
Asia Pacific Equities 0.67	Money Market 2.20	Undisclosed 1.59	Undisclosed 1.98
Asia Pacific EM Equities 0.38	Japanese Equities 1.43	UK Corporate Fixed Interest 2.21	UK Fixed Interest 4.50
Middle East Africa Equities 0.04	Undisclosed 1.48	UK Fixed Interest 1.87	UK Corp Fixed Interest 2.48
	Others 4.67	Others 4.06	Others 2.87

Contact Details

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