

The Chelsea Relegation Zone



	3 year % growth	Quartile position	Status (NE*)
ASIA PACIFIC EXCLUDING JAPAN			
Lloyd George Asia Pacific	9.41	4	~
Melchior Asian Opportunities	7.7	4	NE
Premier Alliance Trust Asia Pacific	11.17	4	NE
Scottish Widows Pacific Growth	30.65	3	NE
Sector Average	38.31	2	

	3 year % growth	Quartile position	Status (NE*)
CAUTIOUS MANAGED			
AXA Defensive Distribution	-12.71	4	~
IFDS Chartwell Balanced Income	-22.13	4	~
IFDS Chartwell Cautious	-11.24	4	~
Premier Hurlingham Balanced Portfolio	-16.41	4	~
Santander MultiManager Cautious	-2.2	3	NE
Thesis Optima Balanced	-4.39	4	NE
Sector Average	0.54	3	

	3 year % growth	Quartile position	Status (NE*)
EUROPE EXCLUDING UK			
AXA Rosenberg European	-17.34	4	~
Henderson European Value	-12.57	4	NE
Legg Mason Continental European Equity	-20.81	4	~
SWIP MultiManager European Equity	-9.47	3	NE
Templeton Europe	-12.83	4	~
WDB European Growth	-15.26	4	NE
Sector Average	-6.21	3	

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GLOBAL BOND			
BlackRock Invest Mgrs UK Ltd Charinco Common Invest	20.33	4	~
City Financial Strategic Global Bond	9.67	4	~
Standard Life Investments Global Index Linked Bond	17.85	4	NE
The 140 Investment Managers Broadway ICVC Income	18.23	4	NE
UBS Absolute Return Bond	-34.09	4	~
Sector Average	29.4	3	

	3 year % growth	Quartile position	Status (NE*)
GLOBAL EMERGING MARKETS			
Aberdeen Multi Manager Emerging Markets Portfolio	13.51	4	~
Martin Currie Emerging Markets	11.69	4	NE
Sector Average	34.2	3	

	3 year % growth	Quartile position	Status (NE*)
GLOBAL GROWTH			
CBF Church of England Investment	-4.77	4	~
JP Morgan Global Equity Income	-11	4	NE
Legal & General (Barclays) MultiManager Global Core	-14.5	4	NE
Legal & General (Barclays) Worldwide Trust	-0.38	3	NE
SLFC Global Trust	0.39	3	NE
SVM Global Opportunities	-25.28	4	~
SWIP Global SRI	2.14	3	NE
Templeton Growth	-5.06	4	~
Sector Average	3.89	2	

	3 year % growth	Quartile position	Status (NE*)
JAPAN			
AXA Framlington Japan	-11.1	4	NE
BlackRock Japan	-21.48	4	~
Legg Mason Japan Equity	-30.33	4	~
Scottish Widows Japan Select Growth	-8.06	3	NE
Standard Life Investments Japan Equity Growth	-14.13	4	NE
SWIP Japanese	-5.05	3	NE
Threadneedle Japan	-13.9	4	NE
Sector Average	-1.7	2	

	3 year % growth	Quartile position	Status (NE*)
NORTH AMERICA			
HSBC American Index	8.97	3	NE
Invesco Perpetual US Equity	-4.21	4	NE
Legal & General (Barclays) MultiManager US Alpha S2	-14.52	4	NE
Sector Average	12.09	2	

	3 year % growth	Quartile position	Status (NE*)
UK ALL COMPANIES			
Architas MM UK Equity Portfolio	-17.59	4	~
Artemis Capital	-22.88	4	~
Aviva Investors Sustainable Future UK Growth	-19.9	4	~
Aviva Investors UK Ethical	-21.2	4	~
Aviva Investors UK Growth & Value	-13.01	4	~
CF GHC MultiManager UK Equity	-14.24	4	~
F&C UK Opportunities	-15.43	4	NE
Family Charities Ethical	-25.49	4	NE
Henderson UK Equity	-16.5	4	~
Invesco Perpetual UK Growth	-21.27	4	NE
JPM Morgan Premier Equity Growth	-22.49	4	~
Jupiter Environmental Income	-21.73	4	~
Legal & General (Barclays) MultiManager UK Alpha	-10.98	3	NE
Marks & Spencer Ethical Acc	-16.96	4	NE
Martin Currie UK Growth	-13.86	4	NE
S&W Opportunities	-16.16	4	~
Santander - Premium UK Equities	-9.25	3	NE
Scottish Widows UK Growth	-12.36	3	~
SJP UK & General Progressive	-20.16	4	NE
Skandia UK Best Ideas	-30.37	4	~
Skandia UK Equity Blend	-19.08	4	NE
Sovereign Ethical	-37.61	4	~
Standard Life Investments UK Equity Manager Of Managers	-12.97	4	NE
SWIP MultiManager UK Equity Growth	-10.9	3	~
Taylor Young Opportunistic	-27.26	4	NE
Templeton UK Equity	-31.34	4	NE
UBS UK Select	-23.3	4	~
Unicorn Free Spirit	-19.23	4	NE
WDB UK Growth	-13.64	4	NE
Sector Average	-8.48	3	

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UK CORPORATE BOND			
AXA Sterling Corporate Bond	-15.02	4	~
AXA Sterling Long Corporate Bond	-1.85	4	~
Sector Average	7.96	3	

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UK EQUITY INCOME			
AXA Framlington Equity Income	-34.47	4	NE
EFA OPM Equity High Income	-21.66	4	~
Scottish Widows UK Equity Income	-20.12	4	NE
Sector Average	-11.7	3	

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UK HIGH YIELD BOND			
SWIP High Yield Bond	0.49	4	~
Sector Average	16.32	1	

	3 year % growth	Quartile position	Status (NE*)
UK SMALLER COMPANIES			
AXA Framlington UK Smaller Cos	-29.77	4	NE
CF Canlife UK Smaller Companies	-29.28	4	~
HSBC UK Smaller Companies	-26.52	4	NE
Insight UK Small Cap	-21.25	3	NE
Invesco Perpetual UK Smaller Companies Growth	-35.88	4	NE
MFM Techninvest Special Situations	-50.1	4	NE
Rensburg UK Micro Cap Growth Trust	-42.06	4	NE
Schroder UK Smaller Companies	-25.59	3	~
UBS UK Smaller Companies	-36.49	4	NE
Sector Average	-17.03	3	

Please read the Important Notice on page 2. This is a purely statistical chart, featuring funds which have been 3rd or 4th quartile for three discrete consecutive years.

*NE = New Entry

All cumulative statistics % change, bid to bid, net income reinvested, three years to 23/04/10.

Source: Financial Express Analytics. Whilst every effort has been made to ensure the accuracy of this information, Chelsea Financial Services take no responsibility for any errors, omissions or inaccuracies contained therein.

Past performance is not a guide to future returns.