



Risk Focused Fund Families

Family name	Diamond Rating	Fund name
Barclays GlobalBeta Portfolio	5	Barclays GlobalBeta Portfolio 1
Barclays GlobalBeta Portfolio	5	Barclays GlobalBeta Portfolio 2
Barclays GlobalBeta Portfolio	5	Barclays GlobalBeta Portfolio 3
Barclays GlobalBeta Portfolio	5	Barclays GlobalBeta Portfolio 4
Barclays GlobalBeta Portfolio	5	Barclays GlobalBeta Portfolio 5
BlackRock Consensus	5	BlackRock Consensus 100 Fund
BlackRock Consensus	5	BlackRock Consensus 35 Fund
BlackRock Consensus	5	BlackRock Consensus 60 Fund
BlackRock Consensus	5	BlackRock Consensus 70 Fund
BlackRock Consensus	5	BlackRock Consensus 85 Fund
Brooks Macdonald	5	SVS Brooks Macdonald Blueprint Defensive Income
Brooks Macdonald	5	SVS Brooks Macdonald Blueprint Cautious Growth
Brooks Macdonald	5	SVS Brooks Macdonald Blueprint Balanced
Brooks Macdonald	5	SVS Brooks Macdonald Blueprint Strategic Growth
Brown Shipley	5	SVS Brown Shipley Cautious Fund
Brown Shipley	5	SVS Brown Shipley Income Fund
Brown Shipley	5	SVS Brown Shipley Balanced Fund
Brown Shipley	5	SVS Brown Shipley Growth Fund
Brown Shipley	5	SVS Brown Shipley Dynamic Fund
CG Morningstar	5	CG Morningstar Multi Asset 40 Fund
CG Morningstar	5	CG Morningstar Multi Asset 60 Fund
CG Morningstar	5	CG Morningstar Multi Asset 80 Fund
Close Discretionary Funds	5	Close Diversified Income Portfolio Fund
Close Discretionary Funds	5	Close Conservative Portfolio Fund

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Close Discretionary Funds	5	Close Balanced Portfolio Fund
Close Discretionary Funds	5	Close Growth Portfolio Fund
Dimensional World Allocation	5	Dimensional World Allocation 20/80 Fund
Dimensional World Allocation	5	Dimensional World Allocation 40/60 Fund
Dimensional World Allocation	5	Dimensional World Allocation 60/40 Fund
Dimensional World Allocation	5	Dimensional World Allocation 80/20 Fund
Dimensional World Allocation	5	Dimensional World Equity Fund
Fidelity Multi Asset Allocator	5	Fidelity Multi Asset Allocator Defensive Fund
Fidelity Multi Asset Allocator	5	Fidelity Multi Asset Allocator Strategic Fund
Fidelity Multi Asset Allocator	5	Fidelity Multi Asset Allocator Growth Fund
Fidelity Multi Asset Allocator	5	Fidelity Multi Asset Allocator Adventurous Fund
Fidelity Multi Asset Allocator	5	Fidelity Allocator World Fund
Fidelity Multi Asset Open	5	Fidelity Multi Asset Open Defensive Fund
Fidelity Multi Asset Open	5	Fidelity Multi Asset Open Strategic Fund
Fidelity Multi Asset Open	5	Fidelity Multi Asset Open Growth Fund
Fidelity Multi Asset Open	5	Fidelity Multi Asset Open Adventurous Fund
Fidelity Multi Asset Open	5	Fidelity Open World Fund
Goldman Sachs Asset Management	5	Goldman Sachs Global Multi-Asset Conservative Portfolio
Goldman Sachs Asset Management	5	Goldman Sachs ESG-Enhanced Global Multi-Asset Balanced Portfolio
Goldman Sachs Asset Management	5	Goldman Sachs Global Multi-Asset Growth Portfolio
L&G Mixed Investment	5	Legal & General Mixed Investment 0-20% Fund
L&G Mixed Investment	5	Legal & General Mixed Investment 0-35% Fund
L&G Mixed Investment	5	Legal & General Mixed Investment 20-60% Fund
L&G Mixed Investment	5	Legal & General Mixed Investment 40-85% Fund

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Liontrust	5	Liontrust Sustainable Future Defensive Managed Fund
Liontrust	5	Liontrust Sustainable Future Cautious Managed Fund
Liontrust	5	Liontrust Sustainable Future Managed Fund
Liontrust	5	Liontrust Sustainable Future Managed Growth Fund
Momentum Multi Asset	5	VT Momentum Diversified Cautious Fund
Momentum Multi Asset	5	VT Momentum Diversified Balanced Fund
Momentum Multi Asset	5	VT Momentum Diversified Moderate Fund
Momentum Multi Asset	5	VT Momentum Diversified Growth Fund
Rathbone Greenbank	5	Rathbone Greenbank Total Return Portfolio
Rathbone Greenbank	5	Rathbone Greenbank Defensive Growth Portfolio
Rathbone Greenbank	5	Rathbone Greenbank Strategic Growth Portfolio
Rathbone Greenbank	5	Rathbone Greenbank Dynamic Growth Portfolio
Rathbone Multi Asset	5	Rathbone Multi Asset Total Return Portfolio
Rathbone Multi Asset	5	Rathbone Multi-Asset Defensive Growth Portfolio
Rathbone Multi Asset	5	Rathbone Strategic Income Portfolio
Rathbone Multi Asset	5	Rathbone Multi Asset Strategic Growth Portfolio
Rathbone Multi Asset	5	Rathbone Multi-Asset Dynamic Growth Portfolio
Rathbone Multi Asset	5	Rathbone Multi Asset Enhanced Growth Portfolio
Schroder Blended Portfolios	5	Schroder Blended Portfolio 3
Schroder Blended Portfolios	5	Schroder Blended Portfolio 4
Schroder Blended Portfolios	5	Schroder Blended Portfolio 5
Schroder Blended Portfolios	5	Schroder Blended Portfolio 6
Schroder Blended Portfolios	5	Schroder Blended Portfolio 7
Schroder Blended Portfolios	5	Schroder Blended Portfolio 8

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Schroder Tactical Portfolio	5	Schroder Tactical Portfolio 3
Schroder Tactical Portfolio	5	Schroder Tactical Portfolio 4
Schroder Tactical Portfolio	5	Schroder Tactical Portfolio 5
Schroder Tactical Portfolio	5	Schroder Tactical Portfolio 6
Schroder Tactical Portfolio	5	Schroder Tactical Portfolio 7
SEI	5	SEI Global Assets Fund plc - The SEI Defensive Fund
SEI	5	SEI Global Assets Fund plc - The SEI Conservative Fund
SEI	5	SEI Global Assets Fund plc - The SEI Moderate Fund
SEI	5	SEI Global Assets Fund plc - The SEI Core Fund
SEI	5	SEI Global Assets Fund plc - The SEI Balanced Fund
SEI	5	SEI Global Assets Fund plc - The SEI Growth Fund
SEI	5	SEI Global Assets Fund plc - The SEI Aggressive Fund
Vanguard LifeStrategy	5	Vanguard LifeStrategy 20% Equity Fund
Vanguard LifeStrategy	5	Vanguard LifeStrategy 40% Equity Fund
Vanguard LifeStrategy	5	Vanguard LifeStrategy 60% Equity Fund
Vanguard LifeStrategy	5	Vanguard LifeStrategy 80% Equity Fund
Vanguard LifeStrategy	5	Vanguard LifeStrategy 100% Equity Fund
Aviva Multi-Manager	4	Aviva Investors Multi-Manager 20-60% Shares Fund
Aviva Multi-Manager	4	Aviva Investors Multi-Manager 40-85% Shares Fund
Aviva Multi-Manager	4	Aviva Investors Multi-Manager Flexible Fund
Barclays Multi-Manager Portfolio	4	Barclays MultiManager Portfolio 1
Barclays Multi-Manager Portfolio	4	Barclays MultiManager Portfolio 2

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Barclays Multi-Manager Portfolio	4	Barclays MultiManager Portfolio 3
Barclays Multi-Manager Portfolio	4	Barclays MultiManager Portfolio 4
Barclays Multi-Manager Portfolio	4	Barclays MultiManager Portfolio 5
Charles Stanley Multi Asset	4	MI Charles Stanley Multi Asset 2 Cautious Fund
Charles Stanley Multi Asset	4	MI Charles Stanley Multi Asset 3 Moderate Fund
Charles Stanley Multi Asset	4	MI Charles Stanley Multi Asset 4 Growth Fund
Charles Stanley Multi Asset	4	MI Charles Stanley Multi Asset 5 Adventurous Fund
Close Discretionary Managed	4	Close Managed Income Fund
Close Discretionary Managed	4	Close Managed Conservative Fund
Close Discretionary Managed	4	Close Managed Balanced Fund
Close Discretionary Managed	4	Close Managed Growth Fund
Close Tactical Select	4	Close Tactical Select Passive Conservative Fund
Close Tactical Select	4	Close Tactical Select Passive Balanced Fund
Close Tactical Select	4	Close Tactical Select Passive Growth Fund
Courtiers Total Return	4	Courtiers Total Return Cautious Risk
Courtiers Total Return	4	Courtiers Total Return Balanced Risk
Courtiers Total Return	4	Courtiers Total Return Growth
Edentree Responsible and Sustainable MA	4	Edentree Responsible and Sustainable Multi-Asset Cautious Fund
Edentree Responsible and Sustainable MA	4	Edentree Responsible and Sustainable Multi-Asset Balanced Fund
Edentree Responsible and Sustainable MA	4	Edentree Responsible and Sustainable Multi-Asset Growth Fund
IBOSS	4	MGTS IBOSS 1
IBOSS	4	MGTS IBOSS 2

Family name	Diamond Rating	Fund name
IBOSS	4	MGTS IBOSS 4
IBOSS	4	MGTS IBOSS 6
Jupiter Merlin	4	Jupiter Merlin Conservative Portfolio
Jupiter Merlin	4	Jupiter Merlin Income
Jupiter Merlin	4	Jupiter Merlin Balanced Portfolio
Jupiter Merlin	4	Jupiter Merlin Growth
Jupiter Merlin	4	Jupiter Merlin Worldwide Portfolio
L&G Multi-Manager	4	Legal & General Multi Manager Income Trust
L&G Multi-Manager	4	Legal & General Multi Manager Balanced Trust
L&G Multi-Manager	4	Legal & General Multi Manager Growth Trust
Mattioli Woods	4	FP Mattioli Woods Cautious Fund
Mattioli Woods	4	FP Mattioli Woods Balanced Fund
Mattioli Woods	4	FP Mattioli Woods Growth Fund
Mattioli Woods	4	FP Mattioli Woods Adventurous Fund
Nedgroup MultiFund	4	Nedgroup Investments MultiFunds Income Fund
Nedgroup MultiFund	4	Nedgroup Investments MultiFunds Balanced Fund
Nedgroup MultiFund	4	Nedgroup Investments MultiFunds Growth Fund
Premier Miton Diversified	4	Premier Miton Diversified Cautious Growth
Premier Miton Diversified	4	Premier Miton Diversified Balanced Growth
Premier Miton Diversified	4	Premier Miton Diversified Growth
Premier Miton Diversified	4	Premier Miton Diversified Dynamic Growth
Royal London GMAP	4	Royal London GMAP Conservative Fund
Royal London GMAP	4	Royal London GMAP Defensive Fund
Royal London GMAP	4	Royal London GMAP Balanced Fund
Royal London GMAP	4	Royal London GMAP Growth Fund

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Royal London GMAP	4	Royal London GMAP Adventurous Fund
Royal London GMAP	4	Royal London GMAP Dynamic Fund
TM UBS Global	4	TM UBS (UK) - Global Yield
TM UBS Global	4	TM UBS (UK) - Global Balanced
TM UBS Global	4	TM UBS (UK) - Global Growth
VT Blackfinch	4	VT Blackfinch Defensive Portfolio Fund
VT Blackfinch	4	VT Blackfinch Cautious Portfolio Fund
VT Blackfinch	4	VT Blackfinch Balanced Portfolio Fund
VT Blackfinch	4	VT Blackfinch Income Portfolio Fund
VT Greystone	4	VT Greystone Conservative Managed Fund
VT Greystone	4	VT Greystone Cautious Managed Fund
VT Greystone	4	VT Greystone Balanced Managed Fund
VT Greystone	4	VT Greystone Global Growth Fund
VT PortfolioMetrix	4	VT PortfolioMetrix GBP Core Cautious Fund
VT PortfolioMetrix	4	VT PortfolioMetrix GBP Core Balanced Fund
VT PortfolioMetrix	4	VT PortfolioMetrix GBP Core Assertive Fund
WAY Global	4	WAY Global Cautious Portfolio
WAY Global	4	WAY Global Balanced Portfolio Fund
WAY Global	4	WAY Flexible Global Growth Portfolio Fund
Apollo	3	FP Apollo Multi Asset Adventurous Fund
Apollo	3	FP Apollo Multi Asset Balanced Fund
Apollo	3	FP Apollo Multi Asset Cautious Fund
ASI Multi-Manager	3	ASI Multi-Manager Cautious Managed Portfolio
ASI Multi-Manager	3	ASI Multi-Manager Multi-Asset Distribution Portfolio
ASI Multi-Manager	3	ASI Multi-Manager Balanced Managed Portfolio

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ASI Multi-Manager	3	ASI Multi-Manager Equity Managed Portfolio
Barclays Active Diversified Multi-Manager	3	Barclays Multi-Asset Cautious Income
Barclays Active Diversified Multi-Manager	3	Barclays Multi-Asset Balanced Income
Barclays Active Diversified Multi-Manager	3	Barclays Dividend and Growth Portfolio
Barclays Multi-Asset	3	Barclays Multi-Asset Defensive Fund
Barclays Multi-Asset	3	Barclays Multi-Asset Cautious Fund
Barclays Multi-Asset	3	Barclays Multi-Asset Balanced Fund
Barclays Multi-Asset	3	Barclays Multi-Asset Growth Fund
Barclays Multi-Asset	3	Barclays Multi-Asset Adventurous Growth Fund
CT MM Navigator	3	CT MM Navigator Distribution Fund
CT MM Navigator	3	CT MM Navigator Cautious Fund
CT MM Navigator	3	CT MM Navigator Balanced Fund
CT MM Navigator	3	CT MM Navigator Growth Fund
CT MM Navigator	3	CT MM Navigator Boutiques Fund
Davy	3	Davy UK GPS Defensive Growth Fund
Davy	3	Davy UK GPS Cautious Growth Fund
Davy	3	Davy UK GPS Balanced Growth Fund
Davy	3	Davy UK GPS Long Term Growth Fund
DMS Stirling House	3	DMS Stirling House Monthly Income Fund
DMS Stirling House	3	DMS Stirling House Balanced Fund
DMS Stirling House	3	DMS Stirling House Dynamic Fund
DMS Stirling House	3	DMS Stirling House Growth Fund
EF Brompton Global	3	EF Brompton Global Conservative

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EF Brompton Global	3	EF Brompton Global Income Fund
EF Brompton Global	3	EF Brompton Global Balanced
EF Brompton Global	3	EF Brompton Global Growth Fund
EF Brompton Global	3	EF Brompton Global Opportunities Fund
EF Brompton Global	3	EF Brompton Global Equity Fund
Equilibrium	3	IFSL Equilibrium Defensive
Equilibrium	3	IFSL Equilibrium Cautious Portfolio
Equilibrium	3	IFSL Equilibrium Balanced Portfolio
Equilibrium	3	IFSL Equilibrium Adventurous Portfolio
Handelsbanken	3	Handelsbanken Defensive Multi Asset Fund
Handelsbanken	3	Handelsbanken Cautious Multi Asset Fund
Handelsbanken	3	Handelsbanken Income Multi Asset Fund
Handelsbanken	3	Handelsbanken Balanced Multi Asset Fund
Handelsbanken	3	Handelsbanken Income Plus Multi Asset Fund
Handelsbanken	3	Handelsbanken Growth Multi Asset Fund
Janus Henderson Multi Manager	3	Janus Henderson Multi-Manager Diversified Fund
Janus Henderson Multi Manager	3	Janus Henderson Multi-Manager Distribution Fund
Janus Henderson Multi Manager	3	Janus Henderson Multi-Manager Income & Growth Fund
Janus Henderson Multi Manager	3	Janus Henderson Multi-Manager Managed Fund
Janus Henderson Multi Manager	3	Janus Henderson Multi-Manager Active Fund
M&G Episode	3	M&G Episode Income Fund
M&G Episode	3	M&G Episode Allocation Fund
M&G Episode	3	M&G Episode Growth Fund

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Margetts	3	Margetts Providence Strategy Fund
Margetts	3	Margetts Select Strategy Fund
Margetts	3	Margetts Intl Strategy Fund
Margetts	3	Margetts Venture Strategy Fund
Margetts Clarion	3	MGTS Clarion Prudence Portfolio
Margetts Clarion	3	MGTS Clarion Navigator Portfolio
Margetts Clarion	3	MGTS Clarion Meridian Portfolio
Margetts Clarion	3	MGTS Clarion Explorer Portfolio
NFU Mutual	3	NFU Mutual Mixed Portfolio 20 - 60% Shares
NFU Mutual	3	NFU Mutual Mixed Portfolio 40 - 85% Shares
NFU Mutual	3	NFU Mutual Mixed Portfolio Max 100% Shares
Quilter Cheviot Libero	3	Libero Cautious Fund
Quilter Cheviot Libero	3	Libero Strategic Fund
Quilter Cheviot Libero	3	Libero Balanced Fund
Tilney Active Portfolios	3	Tilney Defensive Portfolio
Tilney Active Portfolios	3	Tilney Conservative Portfolio
Tilney Active Portfolios	3	Tilney Cautious Portfolio
Tilney Active Portfolios	3	Tilney Balanced Portfolio
Tilney Active Portfolios	3	Tilney Growth Portfolio
Tilney Active Portfolios	3	Tilney Adventurous Portfolio
Tilney Active Portfolios	3	Tilney Maximum Growth Portfolio
TM UBS UK	3	TM UBS (UK) - UK Income Focus
TM UBS UK	3	TM UBS (UK) - UK Balanced
TM UBS UK	3	TM UBS (UK) - UK Growth
TM UBS UK	3	TM UBS (UK) - UK Equity

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True Potential	3	True Potential Defensive Fund
True Potential	3	True Potential Cautious Fund
True Potential	3	True Potential Balanced Fund
True Potential	3	True Potential Growth Fund
True Potential	3	True Potential Aggressive Fund
VT Tatton Blended	3	VT Tatton Blended Defensive Fund
VT Tatton Blended	3	VT Tatton Blended Cautious Fund
VT Tatton Blended	3	VT Tatton Blended Balanced Fund
VT Tatton Blended	3	VT Tatton Blended Active Fund
VT Tatton Blended	3	VT Tatton Blended Aggressive Fund
Wesleyan	3	Wesleyan Low Risk/Reward Growth Fund
Wesleyan	3	Wesleyan Moderate High Risk/Reward Income Fund
Wesleyan	3	Wesleyan Moderate Risk/Reward Growth Fund
WS Sequel	3	WS Sequel Cautious Target Return Strategy Fund
WS Sequel	3	WS Sequel Balanced Target Return Strategy Fund
WS Sequel	3	WS Sequel Growth Target Return Strategy Fund
Handelsbanken Sustainable Multi Asset	2	LF Handelsbanken Defensive Sustainable Multi Asset Fund
Handelsbanken Sustainable Multi Asset	2	LF Handelsbanken Cautious Sustainable Multi Asset Fund
Handelsbanken Sustainable Multi Asset	2	LF Handelsbanken Balanced Sustainable Multi Asset Fund
Handelsbanken Sustainable Multi Asset	2	LF Handelsbanken Growth Sustainable Multi Asset Fund
Invesco Summit Growth	2	Invesco Summit Growth 1 Fund
Invesco Summit Growth	2	Invesco Summit Growth 2 Fund
Invesco Summit Growth	2	Invesco Summit Growth 3 Fund

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Invesco Summit Growth	2	Invesco Summit Growth 4 Fund
Invesco Summit Growth	2	Invesco Summit Growth 5 Fund
Margetts Prima	2	Prima Cautious Fund
Margetts Prima	2	Prima Balanced Fund
Margetts Prima	2	Prima Adventurous Fund
Mazarin	2	Mazarin Cautious Fund
Mazarin	2	Mazarin Balanced Fund
Mazarin	2	Mazarin Adventurous Fund
MGTS Tempus	2	MGTS Tempus Fund Defensive Portfolio
MGTS Tempus	2	MGTS Tempus Fund Universal Portfolio
MGTS Tempus	2	MGTS Tempus Fund Enterprise Portfolio
MGTS Tempus	2	MGTS Tempus Fund Growth Portfolio
RBS Personal Portfolio	2	Personal Portfolio 1
RBS Personal Portfolio	2	Personal Portfolio 2
RBS Personal Portfolio	2	Personal Portfolio 3
RBS Personal Portfolio	2	Personal Portfolio 4
RBS Personal Portfolio	2	Personal Portfolio 5
Sanlam	2	IFSL Sanlam Conservative Fund
Sanlam	2	IFSL Sanlam Defensive Fund
Sanlam	2	IFSL Sanlam Cautious Fund
Sanlam	2	IFSL Sanlam Balanced Fund
Sanlam	2	IFSL Sanlam Growth Fund
Vanguard SustainableLife	2	Vanguard SustainableLife 40-50% Equity Fund
Vanguard SustainableLife	2	Vanguard SustainableLife 60-70% Equity Fund
Vanguard SustainableLife	2	Vanguard SustainableLife 80-90% Equity Fund

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VT Astute	2	VT Astute Conservative Fund
VT Astute	2	VT Astute Balanced Fund
VT Astute	2	VT Astute Growth Fund
Invesco Summit Responsible	1	Invesco Summit Responsible 1 Fund
Invesco Summit Responsible	1	Invesco Summit Responsible 2 Fund
Invesco Summit Responsible	1	Invesco Summit Responsible 3 Fund
Invesco Summit Responsible	1	Invesco Summit Responsible 4 Fund
Invesco Summit Responsible	1	Invesco Summit Responsible 5 Fund
MGTS Wealth Solutions	1	Wealth Solutions Defensive Fund
MGTS Wealth Solutions	1	Wealth Solutions Balanced Fund
MGTS Wealth Solutions	1	Wealth Solutions Adventurous Fund
MI Brewin Dolphin	1	MI Brewin Dolphin Voyager Max 40% Equity
MI Brewin Dolphin	1	MI Brewin Dolphin Voyager Max 60% Equity
MI Brewin Dolphin	1	MI Brewin Dolphin Voyager Max 70% Equity
MI Brewin Dolphin	1	MI Brewin Dolphin Voyager Max 80% Equity
MI Brewin Dolphin	1	MI Brewin Dolphin Voyager Max 90% Equity
MI Brewin Dolphin	1	MI Brewin Dolphin Voyager Max 100% Equity