

Academy of Funds

Summary for Fund Groups | Quarter 3 2020

For full listings, please refer to the Q3 Academy of Funds Analytics Report

New ratings:



Trium ESG Emissions Impact Fund



Aegon Diversified Monthly Income Fund



TB Evenlode Global Income Fund



Schroder Sterling Corporate Bond Fund



Jupiter Japan Income Fund



Liontrust Strategic Bond Fund



Fidelity Short Dated Corporate Bond Fund



Baillie Gifford Multi Asset Growth Fund



Allianz Strategic Bond Fund



Trojan Ethical Fund



First State Sustainable Listed Infrastructure Fund



Most Viewed Active Funds

1. Artemis Global Select I Acc
2. Dodge & Cox Global Stock Acc GBP
3. First Sentier Global Listed Infrastructure B Inc GBP



Most Viewed Responsible Funds

1. Royal London Sustainable World Trust C Acc
2. First Sentier Greater China Growth B GBP Acc
3. Aegon Ethical Equity B Acc



Most Viewed Passive Funds

1. Vanguard LifeStrategy 60% Equity A Acc
2. L&G Japan Index Trust I Acc
3. iShares 100 UK Equity Index (UK) D Acc



Most Viewed Fund Dashboards

1. Stewart Investors Asia Pacific Sustainab. B GBP Acc
2. Aegon Diversified Monthly Income B Inc
3. Jupiter Asian Income I Inc



Most Searched Groups

1. Jupiter Unit Trust Mgrs Ltd
2. First Sentier Investors
3. Schroder UT Managers



Most Viewed Sectors

1. IA Global
2. IA UK All Companies
3. IA Asia Pacific Excluding Japan



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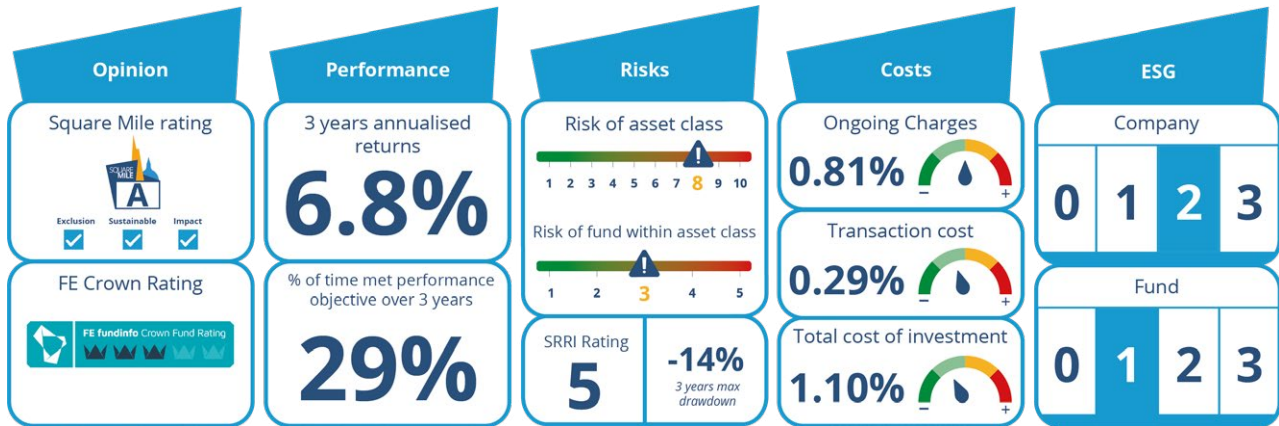


squaremileresearch.com



Fund Dashboard Views Per Pillar

Square Mile partnered with FE fundinfo to launch the Fund Dashboard, an easy-to-interpret overview of core fund information designed to help assess a fund’s ability to meet client’s investment objectives. Combining Square Mile’s qualitative fund research with FE fundinfo’s quantitative analysis, the Fund Dashboard aims to deliver a significant amount of fund data in a simple and intuitive format.

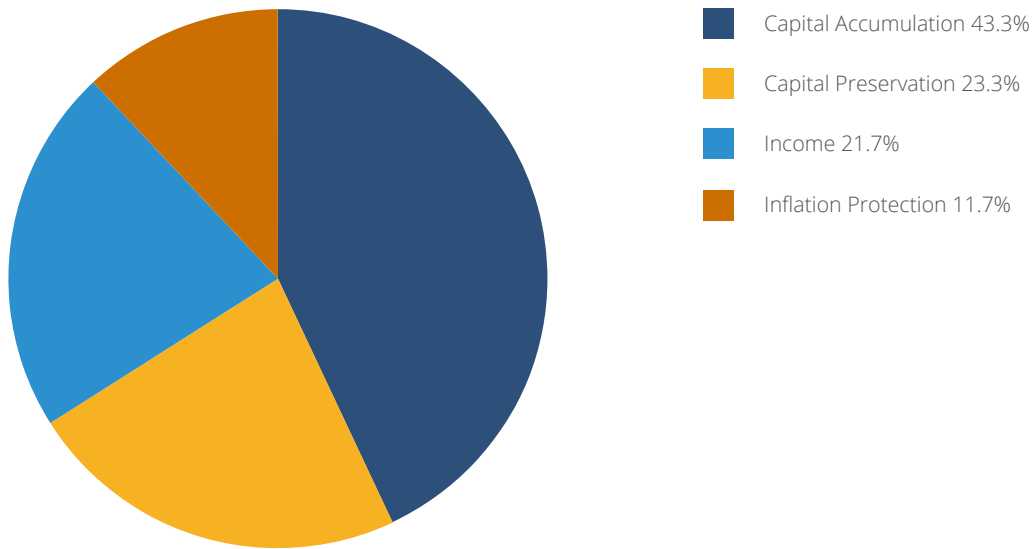


Example for illustrative purposes only.

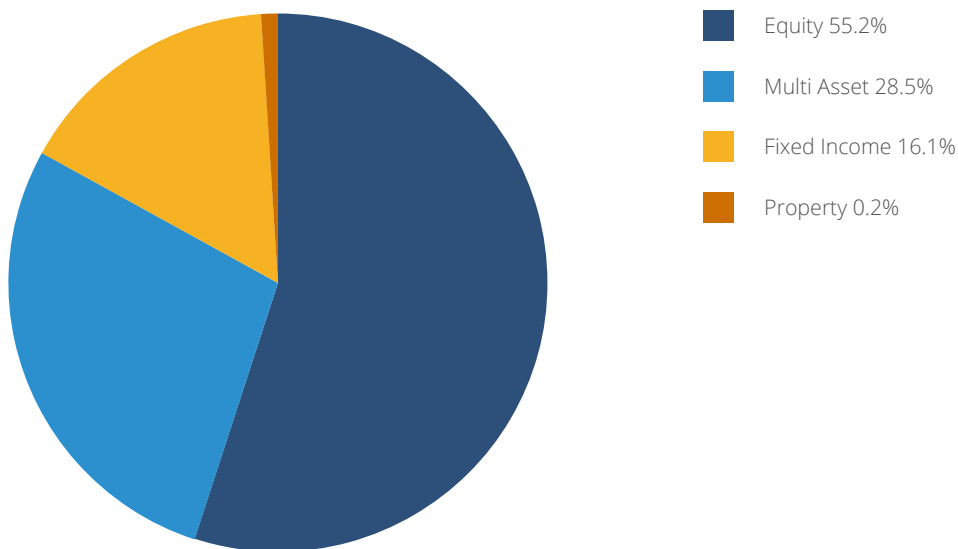
Pillar views over Q3 2020:



Outcome Activity



Asset Class Activity



This is not a recommendation to invest in a particular asset class or outcome.

Views per IA Sector

IA Sector	Change from Q2 2020 %	Q3 2020 Views %
1 IA Global	▲ 0.5%	12.9%
2 IA UK All Companies	▼ -0.3%	10.8%
3 IA Asia Pacific Excluding Japan	▲ 3.8%	9.1%
4 IA Mixed Investment 20-60% Shares	▲ 0.9%	7.8%
5 IA Sterling Strategic Bond	▲ 1.2%	7.8%
6 IA UK Equity Income	▲ 0.7%	6.5%
7 IA Mixed Investment 40-85% Shares	▲ 0.3%	4.7%
8 IA Targeted Absolute Return	▼ -0.3%	4.6%
9 IA Sterling Corporate Bond	▼ -1.0%	4.0%
10 IA Japan	▲ 1.0%	3.6%
11 IA Europe Excluding UK	▼ -2.3%	3.6%
12 IA North America	▼ -0.1%	3.4%
13 IA Flexible Investment	▲ 1.1%	3.4%
14 IA Specialist	▼ -0.7%	2.9%
15 IA Global Emerging Markets	▲ 0.8%	2.7%
16 IA Global Equity Income	▼ -2.2%	2.0%
17 IA Mixed Investment 0-35% Shares	▲ 0.8%	1.7%
18 IA UK Smaller Companies	▼ -0.7%	1.5%
19 IA China/Greater China	▲ 0.3%	1.4%
20 IA Sterling High Yield	▼ -0.3%	1.2%
21 IA Global Bonds	▼ -0.3%	1.1%
22 IA Global EM Bonds - Blended	▲ 0.2%	0.8%
23 IA UK Index Linked Gilts	▼ -0.7%	0.6%
24 IA Technology & Telecommunications	▼ -0.5%	0.3%
25 IA Volatility Managed	▼ -0.2%	0.3%
26 IA Short Term Money Market	▶ 0.0%	0.3%
27 IA UK Direct Property	▼ -0.6%	0.3%
28 IA Unclassified	▼ -0.1%	0.2%
29 IA European Smaller Companies	▼ -0.1%	0.2%
30 IA Japanese Smaller Companies	▼ -0.1%	0.1%
31 IA Europe Including UK	▼ -0.7%	0.1%
32 IA North American Smaller Companies	▼ -0.1%	0.1%
33 IA UK Gilts	▶ 0.0%	0.1%
34 IA Asia Pacific Including Japan	▼ -0.1%	0.0%

This is not a recommendation to invest in a particular IA sector.

Top Viewed Fund by Outcome

Outcome	Top fund viewed
Capital Accumulation	Artemis Global Select I Acc
Capital Preservation	BNY Mellon Real Return Inst W Acc
Income	First Sentier Global Listed Infrastructure B Inc GBP
Inflation Protection	First Sentier Global Listed Infrastructure B Inc GBP

Website statistics Quarter 3 2020

Unique
website
visitors:
9,409

Page
views:
88,276

Source: Square Mile Academy of Funds as at 30th September 2020.

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