

Hotspot

Don't Worry.
Not all your eggs are in one basket.



INVESTMENTS

MORTGAGES

PENSIONS

3

1

2

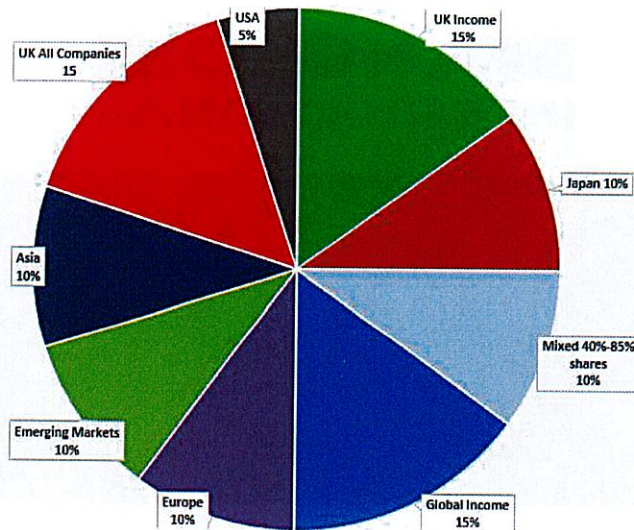
PROTECTION

4

Don't Worry.
Not all your eggs are in one basket.

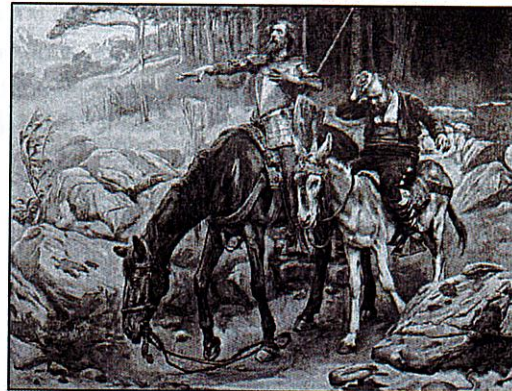
You would be forgiven in thinking that with all the instability being caused by this Government, the possibility of another Prime Minister; price of oil going up; price of food going through the roof; the effect on the markets; that your investments must be being hammered. Well don't worry, not all your investments are in the UK. Generally, these days, only a proportion of ISAs and Pensions are invested in UK Funds.

Balanced Risk 5 & 6



Whilst the UK is going through political turmoil; poor Governance with indecision; wrong decisions on defense and with an energy policy resulting in the highest prices in the world; thankfully the rest of the world is getting on with its life, totally unaffected by what is going on here. The American markets are balanced; unaffected by the Iran war as the economy is booming with Technology and AI; Japan is restructuring and getting its self in good order; the Korean stock market is booming, and South America is out of the doldrums and doing well in every country.

The old-fashioned proverb of "Don't keep all your eggs in one basket" is probably more meaningful today than it was in Don Quixote's time, when it was first written.



Coming up to half way through the year we have been looking at our client portfolios and our most widely used funds.

Client portfolios are well diversified. Firstly, spread between different funds of all the best performing fund managers and from all the well-known investment houses. Our fund choices and client portfolios are regularly reviewed to maintain diversification and best performance along with the minimum of risk.

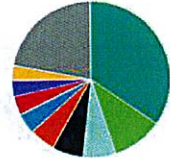
Our most widely used funds in client's portfolios are Artemis Global Income, Artemis Monthly Income and Orbis Global Balanced Standard. Their investments are spread between global fixed interest Bonds along with high performing equities with a good balanced mixture of funds in Fixed Interest and Income Funds of all the major world economies, producing good returns in low-risk investments. You will see that all these funds are in the top quartile over the past five years.

To view these funds in more detail, click the buttons for each fund to take you to the Trustnet page.

> Artemis Global Income < 5

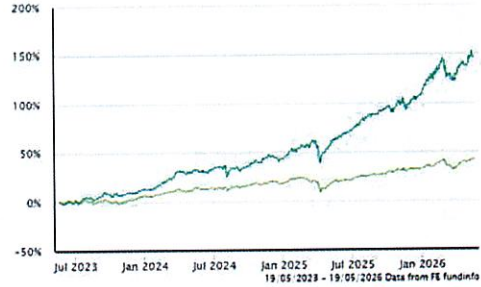
Asset Class Breakdown

(31.03.2026)



Rank	Asset	%
1	US Equities	34.70
2	South Korean Equities	10.41
3	Italian Equities	6.68
4	Chinese Equities	6.37
5	UK Equities	5.33
6	Canadian Equities	4.19
7	French Equities	3.87
8	Norwegian Equities	3.43
9	Japanese Equities	3.02
10	Others	22.01

Cumulative Performance



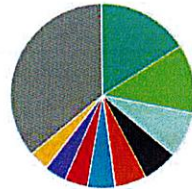
Time Period **3m** 6m 1y 3y 5y

Key	3m	6m	1y	3y	5y
Artemis Global Income I Inc	3.0	25.3	51.8	145.6	161.7
IA Global Equity Income	1.7	9.6	18.2	41.6	61.2
Quartile Ranking	2	1	1	1	1

> Artemis Monthly Distribution < 6

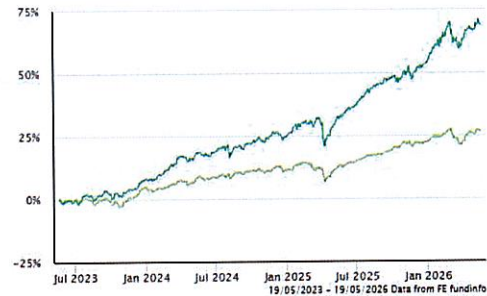
Asset Class Breakdown

(31.03.2026)



Rank	Asset	%
1	US Equities	16.15
2	US Fixed Interest	12.11
3	US Government Fixed Interest	8.05
4	UK Fixed Interest	6.05
5	South Korean Equities	5.59
6	UK Equities	4.85
7	Italian Equities	4.02
8	Global Investment Grade Fixed Interest	3.83
9	Norwegian Equities	3.49
10	Others	35.84

Cumulative Performance



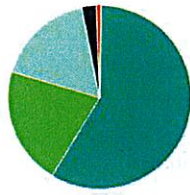
Time Period **3m** 6m 1y 3y 5y

Key	3m	6m	1y	3y	5y
Artemis Monthly Distribution I Inc	1.2	13.5	27.8	68.7	70.4
IA Mixed Investment 20-60% Shares	0.2	5.0	12.1	26.4	22.4
Quartile Ranking	1	1	1	1	1

> Orbis Global Balanced < 7

Asset Class Breakdown

(30.04.2026)



Rank	Asset	%
1	Net Equity	58.45
2	Net Fixed Income	20.96
3	Stockmarket Hedging	17.23
4	Commodity-Linked	2.51
5	Net Current Assets	0.85

Cumulative Performance



Time Period **3 m** 6 m 1 y 3 y 5 y

Orbis Global Balanced Standard IA Mixed Investment 40-85% Shares

Key	3 m	6 m	1 y	3 y	5 y
Orbis Global Balanced Standard	2.5	12.4	29.1	70.6	102.3
IA Mixed Investment 40-85% Shares	1.4	7.0	16.1	33.7	33.8
Quartile Ranking	1	1	1	1	1

As a result of this fund management approach, we are happy to say that notwithstanding the shenanigans that is going on within the UK Government and economy, client's Investments, ISAs and Pensions are standing up quite well and protected from the vagaries of just one market.

The weather is finally brightening up, so I hope you have a lovely Bank Holiday Weekend.

Best regards,
Ray

Inflation falls to 2.8% but is expected to rise from here

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