

Investment Pathways - Discretionary Fund Managers, Multi-Asset & Insurance Distribution Directives

Last Modified on 26/05/2022 12:53 pm BST

Discretionary Funds Managers, Multi-Assets and Insurance Distributions Directives can be used as part of an Illustration.

Portfolios
Discretionary Fund Managers

Filter by Synaptic Risk Rating: Select a risk category

Search by Name, Promoter or Range: Search this list...

Name	Promoter	Range	Asset Class Type	Risk Rating	Risk Category	Last Updated Date
Passive Moderately Cautious	Seven Investment Management (Ri...	Passive	Strategic	5	Balanced (Low End)	21/03/2022, 17:00
8AM Clever MPS 3	Clever Adviser (Risk)	MPS	Strategic	3	Moderately Cautious (Low End)	26/04/2022, 16:51
8AM Clever MPS 4	Clever Adviser (Risk)	MPS	Strategic	4	Moderately Cautious (High End)	26/04/2022, 16:42
8AM Clever MPS 5	Clever Adviser (Risk)	MPS	Strategic	6	Balanced (High End)	26/04/2022, 16:37
8AM Clever MPS 6	Clever Adviser (Risk)	MPS	Strategic	7	Moderately Adventurous (Low End)	26/04/2022, 16:37
8AM Clever MPS 7	Clever Adviser (Risk)	MPS	Strategic	5	Balanced (Low End)	26/04/2022, 16:30

Portfolios
Multi-asset

Filter by Synaptic Risk Rating: Select a risk category

Search by Name, Promoter or Range: Search this list...

Name	Promoter	Range	Asset Class Type	Risk Rating	Risk Category	Last Updated Date
AAP Adventurous C Acc	Seven Investment Management (Ri...	7IM	Strategic	9	Adventurous	21/03/2022, 16:54
AAP Adventurous S Acc	Seven Investment Management (Ri...	7IM	Strategic	9	Adventurous	21/03/2022, 16:57
AAP Balanced C Acc	Seven Investment Management (Ri...	7IM	Strategic	6	Balanced (High End)	21/03/2022, 16:55
AAP Balanced S Acc	Seven Investment Management (Ri...	7IM	Strategic	6	Balanced (High End)	21/03/2022, 16:58
AAP Income C Acc	Seven Investment Management (Ri...	7IM	Strategic	4	Moderately Cautious (High End)	21/03/2022, 16:56
AAP Income S Acc	Seven Investment Management (Ri...	7IM	Strategic	4	Moderately Cautious (High End)	21/03/2022, 16:59

Portfolios
Insurance Distribution Directive

Filter by Synaptic Risk Rating: Select a risk category

Search by Name, Promoter or Range: Search this list...

Name	Promoter	Range	Asset Class Type	Risk Rating	Risk Category	Last Updated Date
Risk Managed 1	Aegon (Risk)	Risk Managed	Strategic	3	Moderately Cautious (Low End)	16/03/2022, 15:13
Aegon Adventurous Core Portfolio	Aegon (Risk)	Core Portfolio	Strategic	10	Very Adventurous	16/03/2022, 15:12
Aegon Balanced Core Portfolio	Aegon (Risk)	Core Portfolio	Strategic	5	Balanced (Low End)	16/03/2022, 15:08
Aegon Balanced Plus Core Portfolio	Aegon (Risk)	Core Portfolio	Strategic	7	Moderately Adventurous (Low End)	16/03/2022, 15:10
Aegon Cautious Core Portfolio	Aegon (Risk)	Core Portfolio	Strategic	4	Moderately Cautious (High End)	16/03/2022, 15:08
Aegon Conservative Core Portfolio	Aegon (Risk)	Core Portfolio	Strategic	2	Cautious	16/03/2022, 15:08

You are able to view the portfolio breakdown by clicking the eye to the left of the portfolio:



Portfolios

Discretionary Fund Managers

	Name	Promote
	Passive Moderately Cautious	Seven In
	Show Portfolio Details	Clever Ac



Portfolio

Passive Moderately Cautious | Passive | Strategic

Portfolio Summary

Seven Investment Management (Risk)

7IM



Risk Profile Category

Balanced (Low End)

Risk Rating

5

Minimum Gain in any 1 Year

-13.59% or -£1,359.00

Average Gain in any 1 Year

2.9% or £290.00

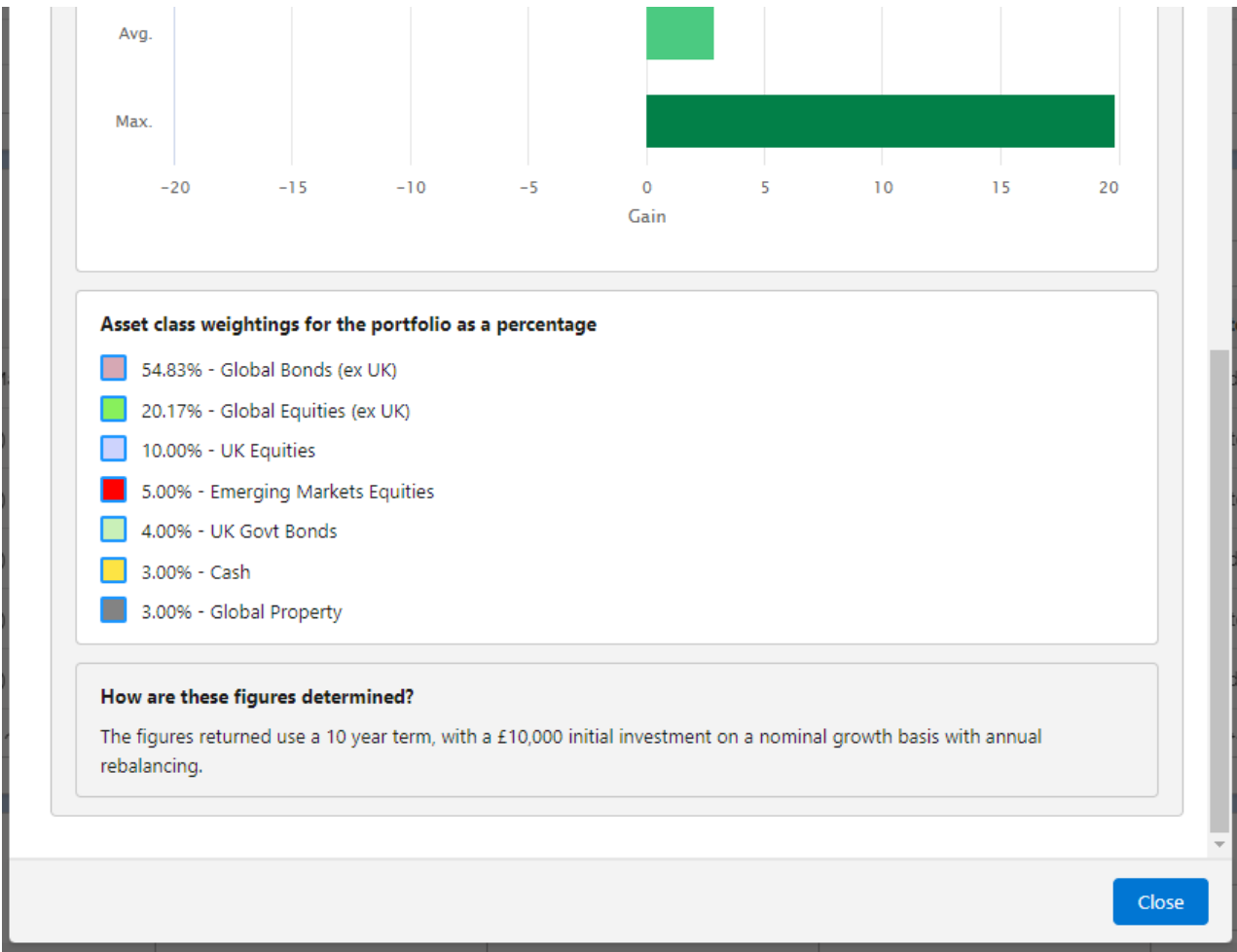
Maximum Gain in any 1 Year

19.86% or £1,986.00

The bar chart displays the minimum, mean and maximum gain values as a percentage for the portfolio.

Min.





If you would like to search by risk rating, use the 'Filter by Synaptic Risk Rating' box:

Discretionary Fund Managers				Filter by Synaptic Risk Rating	Search by Name, Promoter or Range
Name	Promoter	Range	Risk Rating	Select a risk category	Q. Search this list...
Aggressive Active/Passive Portfolio	Cazenove Capital Management Ltd (Risk)	Passive - Active		None	Last Updated Date
Aggressive Portfolio	Cazenove Capital Management Ltd (Risk)	Core		1 - Very Cautious	02/12/2020, 12:32
AJ Bell Active MPS 1	AJ Bell (Risk)	Active		2 - Cautious	02/12/2020, 12:20
AJ Bell Active MPS 2	AJ Bell (Risk)	Active		3 - Moderately Cautious (Low End)	09/12/2020, 12:05
AJ Bell Active MPS 3	AJ Bell (Risk)	Active		4 - Moderately Cautious (High End)	09/12/2020, 12:05
AJ Bell Active MPS 4	AJ Bell (Risk)	Active		5 - Balanced (Low End)	09/12/2020, 12:03
AJ Bell Active MPS 5	AJ Bell (Risk)	Active		6 - Balanced (High End)	19/11/2020, 16:52
AJ Bell Active MPS 6	AJ Bell (Risk)	Active		7 - Moderately Adventurous (Low End)	19/11/2020, 11:50
				8 - Moderately Adventurous (High End)	
				9 - Adventurous	
				10 - Very Adventurous	

Filter by Synaptic Risk Rating

Select a risk category ▼

- None
- 1 - Very Cautious
- 2 - Cautious
- 3 - Moderately Cautious (Low End)
- 4 - Moderately Cautious (High End)
- 5 - Balanced (Low End)
- 6 - Balanced (High End)**
- 7 - Moderately Adventurous (Low End)
- 8 - Moderately Adventurous (High End)
- 9 - Adventurous
- 10 - Very Adventurous

Portfolios
Discretionary Fund Managers

Filter by Synaptic Risk Rating: 6 - Balanced (High End) Search by Name, Promoter or Range: Search this list...

Name	Promoter	Range	Risk Rating	Risk Category	Last Updated Date
AJ Bell Active MPS 3	AJ Bell (Risk)	Active		6 - Balanced (High End)	09/12/2020, 12:03
AJ Bell Pactive MPS 3	AJ Bell (Risk)	Pactive		6 - Balanced (High End)	09/12/2020, 12:13
AJ Bell Passive MPS 3	AJ Bell (Risk)	Passive		6 - Balanced (High End)	09/12/2020, 12:04
Balanced MPS	Brewin Dolphin (Risk)	Balanced		6 - Balanced (High End)	07/12/2020, 13:36
Balanced Plus	Rathbones (Risk)	Managed Portfolio		6 - Balanced (High End)	02/12/2020, 14:13
Conventional MPS 3	Aberdeen Standard Capital (Risk)	Conventional MPS		6 - Balanced (High End)	19/11/2020, 16:19
Finsamir Baselia 3	Charles Stanley (Risk)	Finsamir Baselia		6 - Balanced (High End)	03/11/2020, 17:38

You can also search by the Name, Promoter or Range:

Filter by Synaptic Risk Rating: 6 - Balanced (High End) Search by Name, Promoter or Range: Search this list...

Filter by Synaptic Risk Rating & Search by Name, Promoter or Range, are available under each of the portfolio types. Only Discretionary Fund Managers, Multi-Asset and Insurance Distribution Directive have the eye icon to view details, as the underlying information can not be opened/amended.

See next article [Investment Pathways - Model & Bespoke Portfolios](#)