

Risk Illustrations - Advanced Options - Change Portfolio/Fund

Last Modified on 13/02/2024 3:35 pm GMT

If you would like to change the portfolio or fund for your Illustration, click 'Change'

Illustration Settings

Investment Details

*Term of Investment in Years
20

*Initial Amount £
£200,000

Frequency of Contribution
Monthly

*Regular Amount £
£200

Indexation Rate for Contribution
Retail Price Index (RPI) 4.9%

Indexation Rate %
4.90%

Rebalance Annually Active

Allow for the Impact of Inflation Inactive

*Regular Withdrawal £
£500

Frequency of Withdrawal
Annually

Indexation Rate for Withdrawal
Retail Price Index (RPI) 4.9%

Indexation Rate %
4.90%

> Portfolio

Click 'Change' to open the search box:

Illustration Settings

> Investment Details

▼ Portfolio

Target Portfolio
AAP Income S Acc
 MultiAsset | Moderately Cautious (High End) - 4 of 10 | Strategic

Change

Portfolio Risk Measures

Min. Gain	Mean Gain	Max. Gain
-12.40%	3.10%	18.91%

Search for the portfolio/fund and select from the drop down:

Illustration Settings

> Investment Details

▼ Portfolio

All

Portfolio is required

- AAP Balanced S Acc • Seven ...
MultiAsset • Balanced (High ...
- AAP Income C Acc • Seven In...
MultiAsset • Moderately Cau...
- AAP Income S Acc • Seven In...
MultiAsset • Moderately C...**
- AAP Moderately Adventuro...
MultiAsset • Moderately Adv...

Advanced Search

Use the option on this page to modify on the graph

Chart Efficient Fronti

Target

E700000

E800000

E400000

E300000

Values

E240k E251k

This will update the portfolio/fund details. You will need to click 'Update' to change on the illustration:

Illustration Settings

> Investment Details

▼ Portfolio

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AAP Income C Acc
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Portfolio Risk Measures

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Illustration Settings

> Investment Details

∨ Portfolio

Target Portfolio

AAP Income C Acc

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Portfolio Risk Measures

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Use the option on this page to modify the parameters for the illustration and toggle the values you want to review on the graph

Update

Revert

Chart Efficient Frontier Portfolio Probability

Target

