

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

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

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

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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	
7IM Passive Adventurous	S
Show Portfolio Details	bus Plus S

Portfolio

7IM Passive Adventurous | Passive | Strategic

Portfolio Summary

Seven Investment Management (Risk)



Risk Profile Category

Moderately Adventurous

Risk Rating

4.8

Minimum Gain in any 1 Year

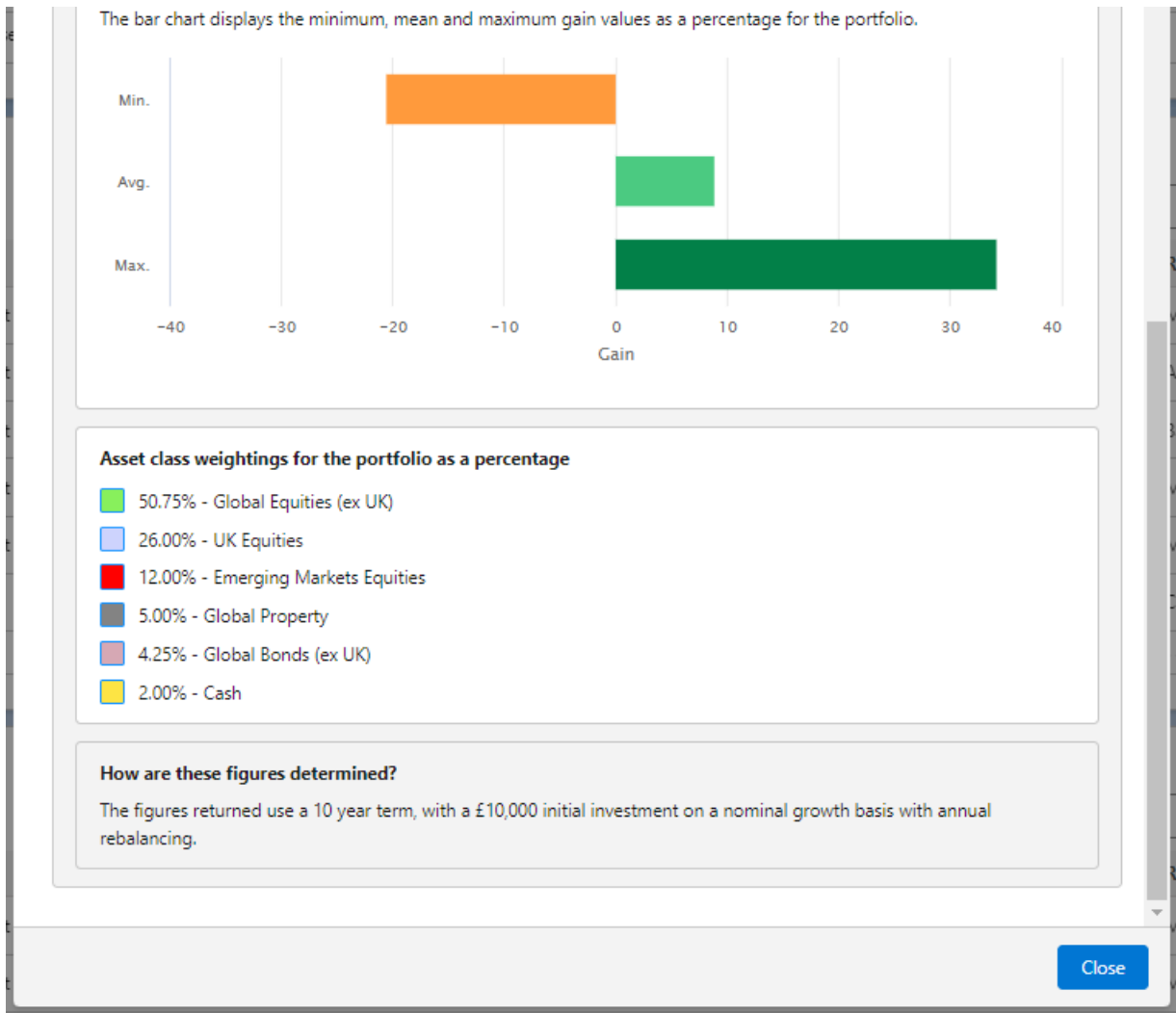
-20.58% or -£2,058.00

Average Gain in any 1 Year

8.87% or £887.00

Maximum Gain in any 1 Year

34.3% or £3,430.00



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

Portfolios
Discretionary Fund Managers

Filter by Synaptic Risk Rating:

Search by Name, Promoter or Range:

Name	Promoter	Range	Risk Rating	Last Updated Date
Aggressive Active/Passive Portfolio	Cazenove Capital Management Ltd (Risk)	Passive - Active	None	02/12/2020, 12:32
Aggressive Portfolio	Cazenove Capital Management Ltd (Risk)	Core	1 - Very Cautious	02/12/2020, 12:20
AJ Bell Active MPS 1	AJ Bell (Risk)	Active	2 - Cautious	09/12/2020, 12:05
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, 12:03
AJ Bell Active MPS 4	AJ Bell (Risk)	Active	5 - Balanced (Low End)	19/11/2020, 16:52
AJ Bell Active MPS 5	AJ Bell (Risk)	Active	6 - Balanced (High End)	11/11/2020, 11:50
			7 - Moderately Adventurous (Low End)	
			8 - Moderately Adventurous (High End)	
			9 - Adventurous	
			10 - Very Adventurous	

Search by Name, Promoter or Range:

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
Punamir Besclua 3	Charles Stanley (Risk)	Punamir Besclua		6 - Balanced (High End)	03/12/2020, 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.

You are able to create and amend your own [Investment Pathways - Model & Bespoke Portfolios](#)