Investment Pathways - Risk Ratings

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

In our 6.7 release we have released granular risk ratings.

You will be able to view Discretionary Fund Managers, Multi-Asset and Insurance Distribution Directive risk ratings by an additional decimal point:

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	Synaptic Pathways Home	Paraplanner Access Centre Con		Portfe		ifedge Base My Apps &	Settings Valuations		
8	Portfolios Multi-asset		7IM AAP Adventurous C Acc 7IM Strategic				Search by Name, Promoter or Range V Q, Search this list		
	Name 🗸	Promoter		Management (Risk)	71	Risk Category	✓ Last Updated Date ✓		
	7IM AAP Adventurous C Acc	Seven Investment Management			71N	vloderately Adventurous	26/10/2023, 11:47		
0	7IM AAP Adventurous S Acc	Seven Investment Management				vloderately Adventurous	13/10/2023, 09:59		
o	7IM AAP Balanced C Acc	Seven Investment Management	Sunantic	1	Risk Profile Category Moderately Adventurous	3alanced	26/10/2023, 11:48		
o	7IM AAP Balanced S Acc	Seven Investment Management	Synaptic Risk Rating 4.7		Risk Rating 4.7	Balanced	13/10/2023, 09:58		
0	7IM AAP Income C Acc	Seven Investment Management	4./	5		vloderately Cautious	19/12/2023, 02:00		
0	7IM AAP Income S Acc	Seven Investment Management	Minimum Gain in an	ny 1 Year		vloderately Cautious	14/12/2023, 09:07		
-		* • • • • •	-20.2% or -£2,020.00				50 HA 1995 11 H		
	Portfolios Insurance Distribution Directive		Average Gain in any 1 Year 8.72% or £872.00 Makinum Gain in any 1 Year 33.62% or £3,362.00				by Name, Promoter or Range Search this list		
	Name V	Promoter	The bar chart disp	plays the minimum, mean and maximum gain	values as a percentage for the portfolio.	Risk Category	✓ Last Updated Date ✓		
0	Aviva Smooth Managed 2 Fund	Aviva (Risk)				Balanced	15/12/2023, 02:00		
•	Aviva Smooth Managed Fund	Aviva (Risk)	Min.			Balanced	15/12/2023, 02:00		
0	Canlife Diversified Monthly Income	Canada Life Investments (Risk)	Avg.			Balanced	15/12/2023, 02:00		
0	Canlife Diversified Risk Managed 3	Canada Life Investments (Risk)	Max.			vloderately Cautious	15/12/2023, 02:00		
0	Canlife Diversified Risk Managed 3 (Life)	Canada Life Investments (Risk)	MisX.			Vioderately Cautious	18/09/2023, 11:23		
0	Canlife Diversified Risk Managed 4	Canada Life Investments (Risk)				vioderately Cautious	15/12/2023, 02:00		
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