

# WealthSelect Managed Active 6

All data as at 31 March 2026.

## Portfolio managers



Stuart  
Clark



Helen  
Bradshaw



Bethan  
Dixon



## Portfolio objective

The portfolio aims to achieve capital growth over a period of five years or more through a diversified range of investments in the UK and globally.

The portfolio is matched to a risk profile that targets a specific range of volatility of between 55% - 65% of the expected annualised volatility of global equities over the next 10 years and is managed to stay within this range most of the time.

## Performance comparator

IA Mixed Investment 40-85% Shares

## Volatility target

11.10% - 13.10%

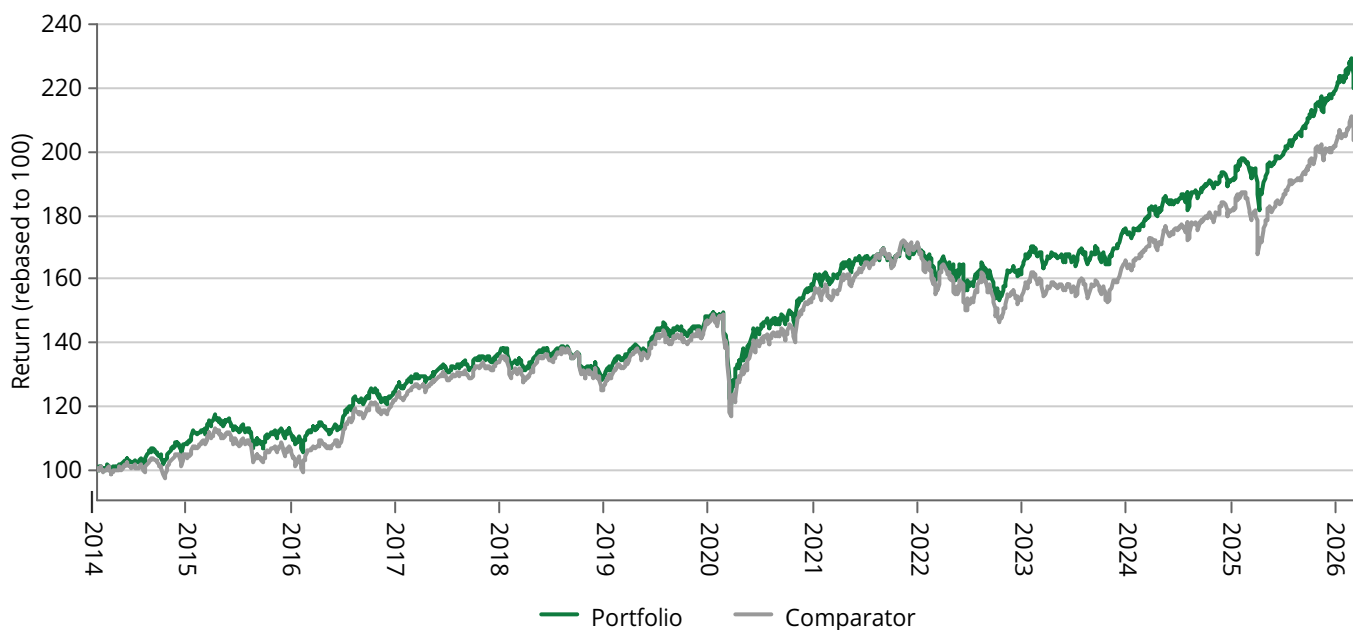
## Weighted fund charge

0.60%

## MPS charge

0.15%

## Cumulative performance since launch



## Performance summary

|            | YTD  | 1 year | 3 years | 5 years | Since launch | 31 Mar 25 to 31 Mar 26 | 29 Mar 24 to 31 Mar 25 | 31 Mar 23 to 29 Mar 24 | 31 Mar 22 to 31 Mar 23 | 31 Mar 21 to 31 Mar 22 |
|------------|------|--------|---------|---------|--------------|------------------------|------------------------|------------------------|------------------------|------------------------|
| Portfolio  | -1.2 | 12.8   | 30.0    | 34.2    | 116.5        | 12.8                   | 5.2                    | 9.6                    | -0.2                   | 3.4                    |
| Comparator | -1.7 | 11.1   | 26.3    | 26.9    | 98.3         | 11.1                   | 3.3                    | 10.1                   | -4.6                   | 5.4                    |

The performance figures shown refer to past performance. Past performance is not a reliable indicator of future performance. Source: Quilter, Morningstar, and FactSet as at 31 March 2026. Total return, percentage growth, net of fees of the underlying funds but before the deduction of the MPS charge, over time periods shown. The performance shown is based on a model of the portfolio held via Quilter's platform. The performance on other platforms may differ. The portfolio launched on 24 February 2014.

## Portfolio holdings

### Developed markets (ex UK) equity 38.68%

| Fund Name  | Investment adviser | Holding (%) |
|--|--------------------|-------------|
| Quilter Investors US Equity Income                         | BNY                | 5.43        |
| Quilter Investors North American Equity                    | Jupiter            | 5.02        |
| Quilter Investors Japanese Equity                          | M&G                | 3.89        |
| Quilter Investors Europe (ex UK) Equity                    | Janus Henderson    | 3.53        |
| Quilter Investors Global Equity Value                      | Redwheel           | 3.09        |
| Quilter Investors Europe (ex UK) Equity Income             | Schroders          | 2.76        |
| Quilter Investors Europe (ex UK) Equity Growth             | Alliance Bernstein | 2.53        |
| Quilter Investors Precious Metals Equity                   | BlackRock          | 2.24        |
| Quilter Investors US Equity Small/Mid-Cap                  | Schroders          | 1.95        |
| Quilter Investors US Equity Growth                         | JP Morgan          | 1.65        |
| Quilter Investors Asia Pacific (ex Japan) Equity           | Fidelity           | 1.58        |
| iShares North American Equity Index                        | BlackRock          | 1.53        |
| Quilter Investors Asia Pacific (ex Japan) Large-Cap Equity | Invesco            | 1.51        |
| Quilter Investors Natural Resources Equity                 | Janus Henderson    | 0.87        |
| Quilter Investors Timber Equity                            | Pictet             | 0.75        |
| Quilter Investors Asia Pacific                             | Jupiter            | 0.34        |

### UK equity 13.71%

| Fund Name                                    | Investment adviser | Holding (%) |
|--|--------------------|-------------|
| Quilter Investors UK Equity Large-Cap Income | Artemis            | 4.28        |
| Quilter Investors UK Equity Opportunities    | Artemis            | 3.71        |
| Quilter Investors UK Equity                  | Jupiter            | 3.70        |
| Quilter Investors UK Equity Growth           | Jupiter            | 2.02        |

### Emerging markets equity 4.73%

| Fund Name  | Investment adviser | Holding (%) |
|--|--------------------|-------------|
| Quilter Investors Emerging Markets Equity Income | Allspring          | 1.69        |
| Quilter Investors Emerging Markets Equity Growth | JP Morgan          | 1.53        |
| Quilter Investors Emerging Markets Equity        | Jupiter            | 1.07        |
| Quilter Investors China Equity                   | Janus Henderson    | 0.45        |

### Fixed interest 16.83%

| Fund Name   | Investment adviser | Holding (%) |
|---|--------------------|-------------|
| Aviva Investors Global Sovereign Bond             | Aviva Investors    | 3.40        |
| iShares UK Gilts All Stocks Index                 | BlackRock          | 2.76        |
| Quilter Investors Corporate Bond                  | Premier Miton      | 2.14        |
| Quilter Investors Diversified Bond                | Premier Miton      | 1.90        |
| Quilter Investors Sterling Diversified Bond       | Schroders          | 1.69        |
| Quilter Investors Dynamic Bond                    | Twenty Four        | 1.26        |
| Quilter Investors Investment Grade Corporate Bond | Invesco            | 1.14        |
| Quilter Investors Sterling Corporate Bond         | Fidelity           | 1.12        |
| Vanguard Euro Government Bond Index               | Vanguard           | 0.86        |
| iShares Up to 10 Years Gilts Index                | BlackRock          | 0.56        |

### Alternatives 25.56%

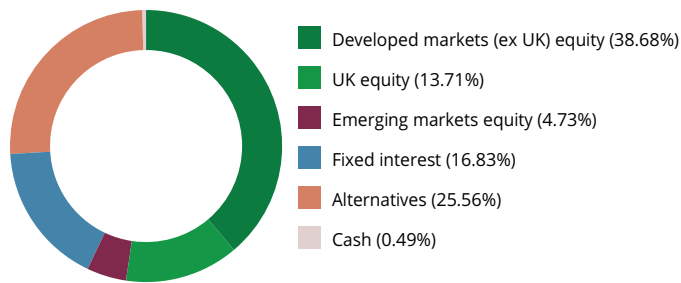
| Fund Name                                       | Investment adviser | Holding (%) |
|---|--------------------|-------------|
| PIMCO Dynamic Bond                              | PIMCO              | 6.84        |
| Quilter Investors Absolute Return Bond          | Janus Henderson    | 6.43        |
| Quilter Investors Global Equity Absolute Return | Jupiter            | 6.04        |
| Quilter Investors Absolute Return Equity        | Janus Henderson    | 2.56        |
| Trium ESG Emissions Improvers                   | Trium              | 1.91        |
| Quilter Investors Long-Short Equity             | JP Morgan          | 1.78        |

### Cash 0.49%

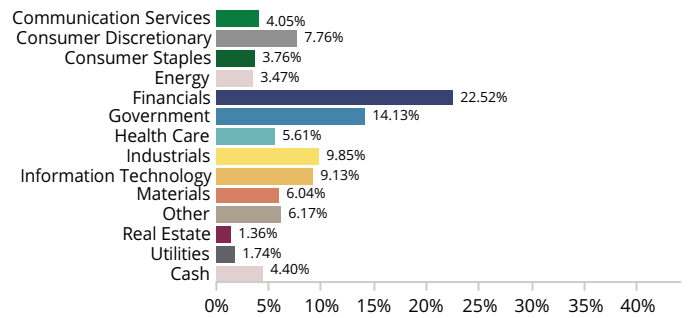
| Fund Name   | Investment adviser | Holding (%) |
|---|--------------------|-------------|
| BlackRock ICS Sterling Liquid Environmentally Aware | BlackRock          | 0.49        |

Source: Quilter, Morningstar, and FactSet as at 31 March 2026. Please note that due to rounding the portfolio holdings may not add up to 100%. The portfolio holdings shown are based on a model of the portfolio held via Quilter's platform. The portfolio holdings on other platforms may differ.

## Asset class breakdown



## Sector breakdown



Source: Quilter, Morningstar, and FactSet as at 31 March 2026. Please note that due to rounding the asset class breakdown and the sector breakdown may not add up to 100%. The asset class breakdown and the sector breakdown shown are based on a model of the portfolio held via Quilter's platform and may differ on other platforms.

## Glossary

### Performance comparator

An index or similar against which we invite investors to compare the performance of the portfolio. The IA Mixed Investment 40-85% Shares sector is representative of funds with exposure to a broad mix of asset types. The allocation of the portfolio to these asset types may be different. Therefore, the performance of the portfolio and the performance comparator may differ.

### Volatility target

The portfolio targets a range of volatility rather than a particular level of growth. Volatility is a measure of how much the returns an investment are likely to fluctuate over time. Higher volatility can indicate higher risk.

### Weighted fund charge

The average of the charges of the funds held in the portfolio based on their weight within the portfolio.

### MPS charge

The amount charged annually for running the portfolio. The charge is expressed as a percentage of the investment held within the portfolio.

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