

# The Week in Investment

5

## Data dashboard

### Unit trusts: top 10 performing funds over one year

	%	Morningstar rating™
WAY Charteris Gold & Prec Metals Elite	175.98	
Junior Gold	170.60	★
Investec Global Gold	144.71	★★★★
Smith & Williamson Global Gold & Res	130.39	★★★★
BlackRock Gold and General	126.35	★★★★★
Old Mutual BlackRock Gold & Gen	125.56	★★★★
CF Ruffer Gold	118.15	★★★
Legg Mason IF Japan Equity	60.76	★★★★
SF Peterhouse Smaller Cos Gold	56.37	
IP Japanese Smaller Companies	51.94	★★★

### Unit trusts: top 10 performing funds over three years

## Manager move



Thomas See, lead manager of the £945m Schroder Income Maximiser fund, is leaving the business following a merger of the structured fund management and portfolio solutions teams. The fund will be taken over by Mike Hodgson, head of risk managed investments and structuring.

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Monday

25 | 07

## Aviva launches low-cost multi-asset range

Aviva has unveiled a suite of low-cost multi-asset portfolios on its platform, to be managed by Morningstar's Dan Kemp and his team. The Governed Portfolios will align with low, medium and high risk brackets on the Distribution Technology scale, encompassing risk levels 3-7. Five portfolios have been launched initially, all aimed at delivering growth, but an income fund will be unveiled later this year. The OCF on the funds will be capped at 50bps and they will primarily invest in passive vehicles.

Tuesday

26 | 07

## JPMAM renames Cautious Managed fund

JP Morgan AM has renamed its Cautious Managed fund in order to align it



**Jupiter Asset Management has appointed former Dalton Strategic Partnership CEO Magnus Spence (pictured) to the newly created role of head of investments, alternatives. He will join the group on 31 August and will be responsible for identifying alternative extensions to existing Jupiter products as well as searching for managers or strategies that would complement and fit into the Jupiter range, CEO Maarten Slendebroek told *Investment Week*. Slendebroek also said fund manager Ben Whitmore is considering the launch of a global version of his £1.3bn UK Special Situations fund.**

Wednesday

27 | 07

## EM managers Young and Asante replaced in SJP's fund range reshuffle

St. James's Place has made a number of changes to its range

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### Unit trusts: top 10 performing funds over three years

	%	Morningstar rating™
Legg Mason IF Japan Equity	102.59	★★★★
GS India Equity Portfolio	101.60	★★★★★
Jupiter India	98.48	★★★
Jupiter JGF India Select	97.58	★★★★
Stewart Invs Indian Subcontinent	89.92	★★★★
Matthews Asia Funds India	84.15	★★★★
Invesco India Equity	82.62	★★★★
Fidelity Global Technology	81.27	★★★★★
BGF India	81.22	★★★
Franklin India	81.07	★★★★

As at 22 July 2016. Source: © 2016 Morningstar

### IA sector average 12-month yield to 26/07/16\*

