# Fusion Champions 1

Factsheet | 01 Jul 2026

## PORTFOLIO SUMMARY

- Low-risk portfolio within the Champions portfolio range
- Suitable for investors seeking stable performance, minimal drawdowns, and moderate returns
- Diversified combination of carefully selected multi-asset funds aligned with Dynamic Planner 3 Risk Level
- Ideal for investors pursuing long-term returns, trust in skilled fund managers, and favour modest management and transaction fees

## PORTFOLIO INFORMATION

| | |
|---|---|
| Inception Date | Apr 2022 |
| Investment Horizon | At least 3 years |
| Total Ongoing charges for underlying funds | 0.38% |
| Management Charge | 0.10% |

## INVESTMENT PRINCIPLES

Fusion Champions portfolios are built using the least correlated combination of the best performing multi-asset funds corresponding to the specified risk level. This results in diversification among the best solutions across the industry, with expertise in monitoring and oversight provided by Fusion.

The Champions range is designed for investors who seek exposure to the 'best in class' multi-asset funds and trust in the skill of leading fund managers, yet appreciate the benefits that diversification brings, particularly across investment strategies and philosophies.

## RISK SCORE

Based on our internal analysis, our Investment Team believes this portfolio corresponds to the following risk levels of external risk profiling tools:

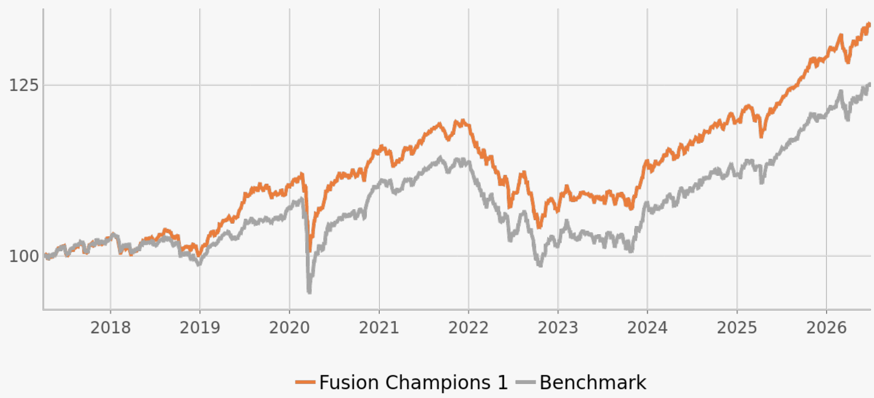
| DT | Defaqto | Synaptic |
|---|---|---|
| 3 | 3 | 4 |

## MARKET COMMENTS

June was a relatively uneventful month for portfolio performance overall, as global equities rose 0.9% and global bonds returned 0.8% (GBP terms). A preliminary peace agreement between the US and Iran signed mid-month created hope for the re-opening of the Strait of Hormuz. The market response was rather anti-climactic – rather than stoking a risk-on rally, an unwinding of geopolitical trades ensued. Commodities (-8.2%) suffered as oil (-21.3%) plummeted on normalizing supply expectations and gold sold (-10.6%) as its safe-haven premium collapsed.

European equities (+3.4%) were month's top performing equity region. As a continent heavily dependent on energy imports, Europe was acutely exposed to the disruption caused by the conflict, and equity markets moved swiftly to price in what normalisation could mean for growth and corporate margins. In the UK, political uncertainty failed to unsettle markets. Keir Starmer announced his resignation as Prime Minister, paving the way for Andy Burnham to take over at No. 10. UK equities were largely unfazed (+1.7%), while the pound and government borrowing costs steadied. Emerging Market Equities fell slightly (-1.0%), as performance diverged across regions. China was a notable laggard (-6.3%), as continuing property sector stress and weaking economic data weighed on investor sentiment. Conversely, Indian equities (+4.4%), which have unperformed for some time, retraced earlier losses due to increased foreign inflows on stabilising currency, supportive policy and normalising energy risks. The period was broadly constructive for bonds, with many major fixed income sectors delivering modest, income-driven positive returns.

## PERFORMANCE




## CUMULATIVE PERFORMANCE

| | 1m | 3m | 1y | 3y | 5y | SI |
|---|---|---|---|---|---|---|
| Portfolio | 0.53% | 4.31% | 9.09% | 23.47% | 14.45% | 33.96% |
| Benchmark | 0.65% | 4.25% | 8.45% | 22.64% | 11.67% | 25.38% |

## RISK CHARACTERISTICS

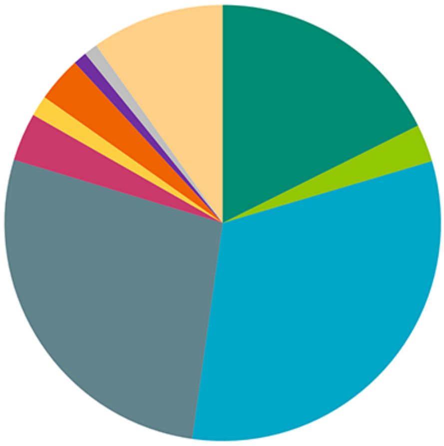
| | Volatility | | | Sharpe Ratio | | | Maximum Drawdown |
|---|---|---|---|---|---|---|---|
| | 1y | 5y | SI | 1y | 5y | SI | |
| Portfolio | 3.23% | 4.25% | 4.62% | 2.81 | 0.52 | 0.59 | -13.16% |
| Benchmark | 3.46% | 4.58% | 4.82% | 2.44 | 0.37 | 0.42 | -13.85% |

*The performance figures in this report are based on the live performance of the portfolio since April 2022. Performance before this date is synthetically built according to the pure quantitative methodology of selecting an equally-weighted portfolio of multi-strategy funds and the actual performance of the selected funds. The benchmark is the Abrdn MyFolio Market I fund which has one of the lowest tracking errors with the IA Mixed investments 0-35 index.

## TOP HOLDINGS

- DIMENSIONAL FUNDS PLC - WORLD ALLOCATION 20/80 FUND
- QUILTER INVESTORS CIRILIUM CONSERVATIVE PASSIVE PORTFOLIO
- BLACKROCK MYMAP 3
- ROYAL LONDON GMAP DEFENSIVE
- LIONTRUST MA PASSIVE PRUDENT FUND

## ASSET ALLOCATION




## HOW TO ACCESS OUR PORTFOLIOS

abrdn, AEGON, AVIVA, Fidelity International, JUSTFA, M&G wealth, Quilter, Scottish Widows, transact take control

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