Fusion Champions 4

Factsheet | 01 Aug 2026

FUSION ASSET MANAGEMENT

PORTFOLIO SUMMARY

- Medium-to-high risk portfolio within the Champions portfolio range
- Suitable for investors seeking long-term capital growth through high-risk equity investments
- Diversified combination of carefully selected multi-asset funds aligned with Dynamic Planner 6 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 5-7 years
Total Ongoing charges for underlying funds	0.34%
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
6	6	7

4JUSTFA

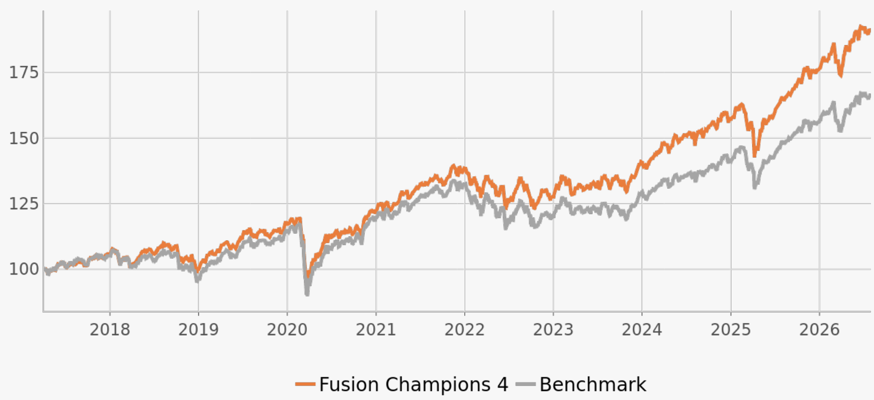
defaqto
DFM MPS on Platform 2026
EXPERT RATED

MARKET COMMENTS

July was a relatively flat month for overall portfolio performance, with global equities slipping -0.9% and global bonds returning -1.9% (GBP terms). July was characterised by a pivot between two distinct market narratives – geopolitics and the AI-led investment cycle. Early in the month, escalating tensions between the US and Iran briefly pushed oil prices back above $100 per barrel, lifting energy prices and commodities (+6.0%). This revived inflation concerns and reinforced expectations that interest rates will remain higher for longer, leading to a broad-based rise in government bond yields.

As geopolitical concerns eased, attention shifted back to the sustainability of returns across the AI landscape. Semiconductor companies (-10.4%) and other AI beneficiaries came under significant pressure as elevated valuations and concerns over the durability of outsized profits weighed on sentiment. This triggered a rotation away from the technology sector (-3.8%) towards more traditional, value-oriented sectors, which was reflected in regional returns. The UK was the top performing region (+3.8%), benefiting from its relatively low exposure to technology and greater weight in energy and financials. US equities (-1.2%) finished the month broadly unchanged. Although company earnings remained strong, investors wanted greater confidence that the significant sums being invested in AI would ultimately translate into sustainable profits. The weakest performance came from emerging markets (-4.3%) and Asia (-4.5%), where AI exposure is concentrated in the semiconductor manufacturing supply chain. Concerns surrounding advanced semiconductor technology from China caused Taiwan (-9.0%) and South Korea (-16.5%) to give up some of their spectacular year-to-date gains, more than offsetting China’s (+7.5%) positive contribution.

PERFORMANCE



CUMULATIVE PERFORMANCE

	1m	3m	1y	3y	5y	SI
Portfolio	-0.20%	4.48%	15.91%	41.08%	44.80%	91.64%
Benchmark	-0.21%	4.26%	11.61%	32.91%	29.84%	66.37%

RISK CHARACTERISTICS

	Volatility			Sharpe Ratio			Maximum Drawdown
	1y	5y	SI	1y	5y	SI	
Portfolio	7.30%	8.70%	9.62%	2.18	0.82	0.70	-21.12%
Benchmark	7.47%	8.55%	9.85%	1.55	0.57	0.52	-23.32%

*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 Aviva Multimanager 40-85% Fund which has one of the lowest tracking errors with the IA Mixed investments 40-85 index.

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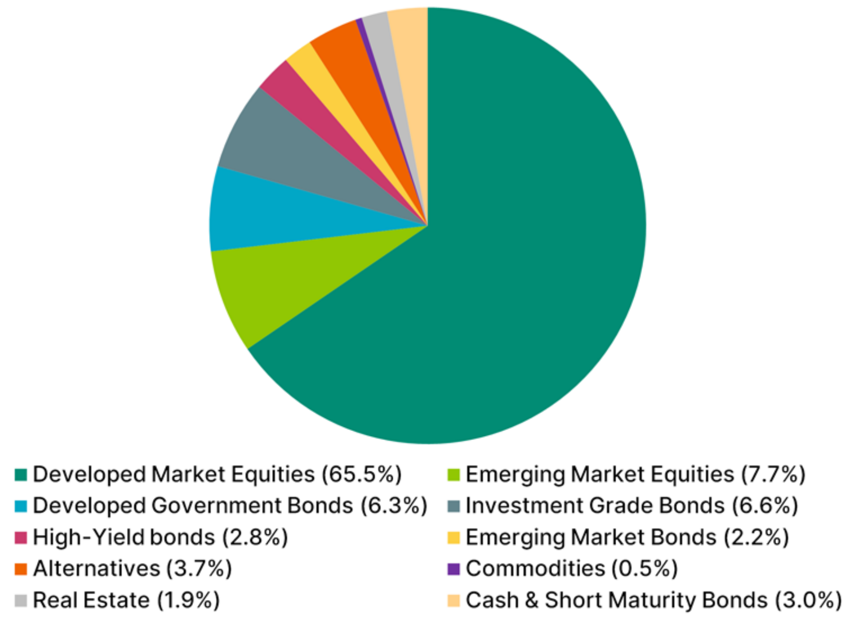
TOP HOLDINGS

- QUILTER INVESTORS CIRILIUM DYNAMIC PASSIVE PORTFOLIO
- WS PRUDENTIAL RISK MANAGED ACTIVE 5 FUND
- ABERDEEN MYFOLIO INDEX IV
- BLACKROCK CONSENSUS 85
- CG AJ BELL MODERATELY ADVENTUROUS

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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