Fusion Champions 4

Factsheet | 01 Sep 2026

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

4 JUSTFA

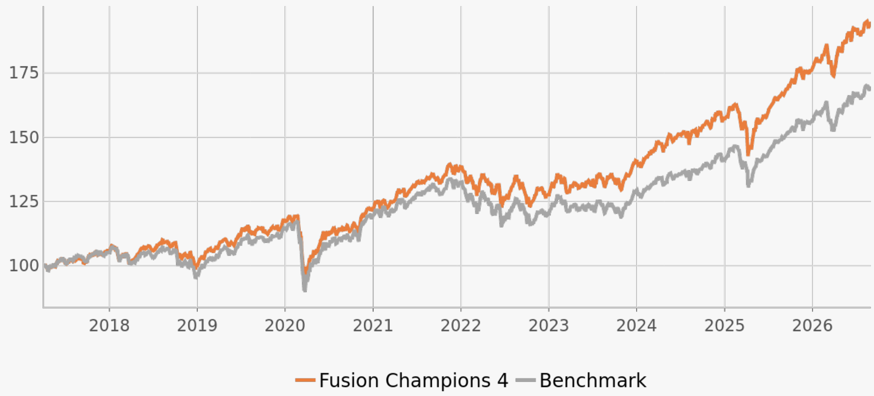
defaqto
DFM MPS on Platform 2026
EXPERT RATED

MARKET COMMENTS

Global markets brushed aside a noisy backdrop in August, delivering a positive month for investors, with global equities rising 1.8% and bonds only marginally detracting from overall performance (-0.3%, GBP terms). The US led the way (+2.1%) as strong corporate results, particularly from technology giants such as Nvidia, boosted optimism around the AI investment cycle. Encouragingly, market gains broadened beyond large technology stocks, with financials, industrials, healthcare and energy companies also attracting investor interest. Japan was a standout performer (+2.8%), as investors welcomed continued corporate governance reforms, higher dividends and a growing focus on shareholder returns. The UK lagged peers, as the main index remained flat (+0.2%). However, there were encouraging signs beneath the surface, with smaller UK companies continuing to outperform (+4.3%) as investors responded to improving economic growth and attractive valuations. Asian equities (+2.8%) delivered positive returns, supported by solid corporate earnings and continued investment in AI and digital infrastructure. China's (-0.8%) stock market bounce proved to be short-lived, with August's activity data highlighting ongoing domestic demand weakness.

Bond markets delivered mixed returns, with corporate bonds, supported by strong fundamentals, generally outperforming government bonds. Inflation concerns, fiscal pressures, increased issuance and shifting central bank expectations pushed long-dated government bond yields to multi-year highs across the US, UK, eurozone and Japan. Commodity markets (+6.7%) rallied over the month. Gold (+9.5%) was a top performer, benefiting from demand for safe-haven assets and concerns about inflation, while agricultural commodities (+11.7%), particularly wheat, rose on supply disruption worries and adverse weather conditions.

PERFORMANCE



CUMULATIVE PERFORMANCE

	1m	3m	1y	3y	5y	SI
Portfolio	1.42%	1.77%	16.60%	45.00%	43.83%	94.37%
Benchmark	2.03%	2.49%	13.23%	37.47%	29.69%	69.75%

RISK CHARACTERISTICS

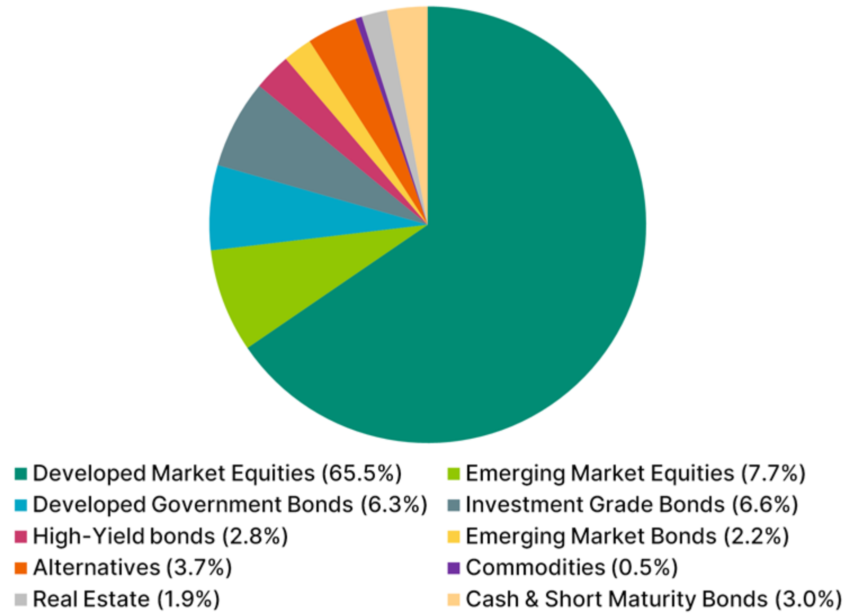
	Volatility			Sharpe Ratio			Maximum Drawdown
	1y	5y	SI	1y	5y	SI	
Portfolio	7.52%	8.71%	9.59%	2.21	0.81	0.71	-21.12%
Benchmark	7.75%	8.56%	9.83%	1.71	0.56	0.54	-23.32%

*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.

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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