

Academy of Funds

Summary for Fund Groups | Quarter 4 2020

For full listings, please refer to the Q4 Academy of Funds Analytics Report

New ratings:



Most Viewed Active Funds

1. AXA Framlington UK Select Opportunities ZI Acc
2. Aegon Diversified Monthly Income B Inc
3. Allianz Strategic Bond C



Most Viewed Responsible Funds

1. Baillie Gifford Positive Change B Acc
2. EdenTree Investment Funds Amity Short Dated Bond B
3. Threadneedle UK Social Bond ZNI GBP



Most Viewed Passive Funds

1. Vanguard LifeStrategy 40% Equity A Acc
2. Vanguard LifeStrategy 100% Equity A Acc
3. L&G International Index Trust I Acc



Most Viewed Fund Dashboards

1. Vanguard LifeStrategy 100% Equity A Acc
2. Fidelity Multi Asset Income W Inc
3. Fundsmith Equity I Acc



Most Searched Groups

1. Jupiter Unit Trust Mgrs Ltd
2. Baillie Gifford & Co Ltd
3. AXA IM UK



Most Viewed Sectors

1. IA UK All Companies
2. IA Mixed Investment 20-60% Shares
3. IA Global



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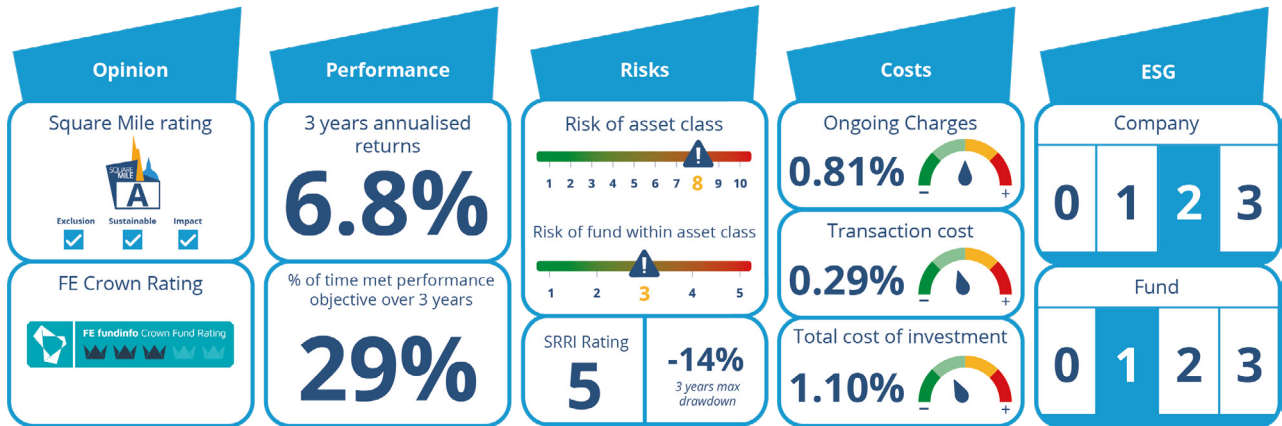


squaremileresearch.com



Fund Dashboard Views Per Pillar

Square Mile partnered with FE fundinfo to launch the Fund Dashboard, an easy-to-interpret overview of core fund information designed to help assess a fund’s ability to meet client’s investment objectives. Combining Square Mile’s qualitative fund research with FE fundinfo’s quantitative analysis, the Fund Dashboard aims to deliver a significant amount of fund data in a simple and intuitive format.

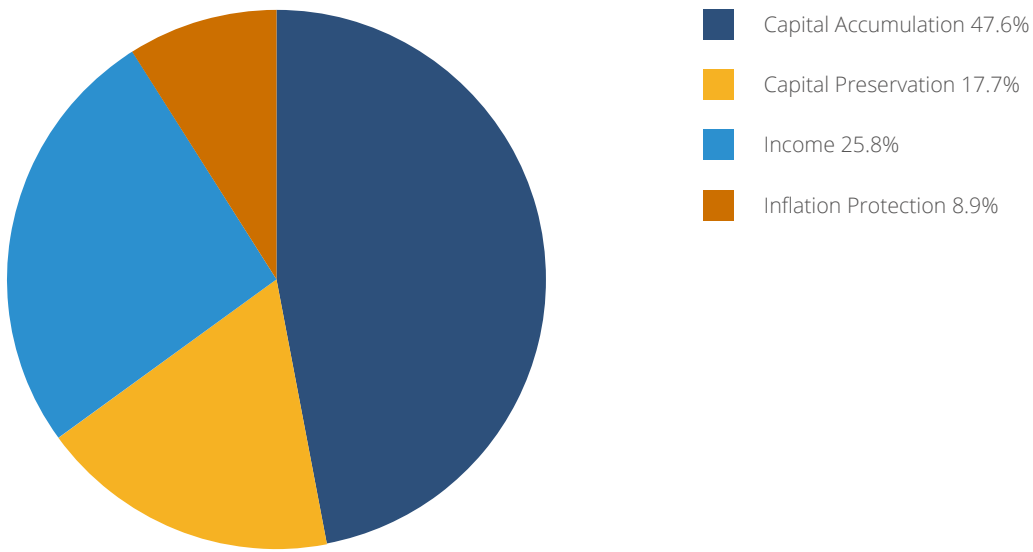


Example for illustrative purposes only.

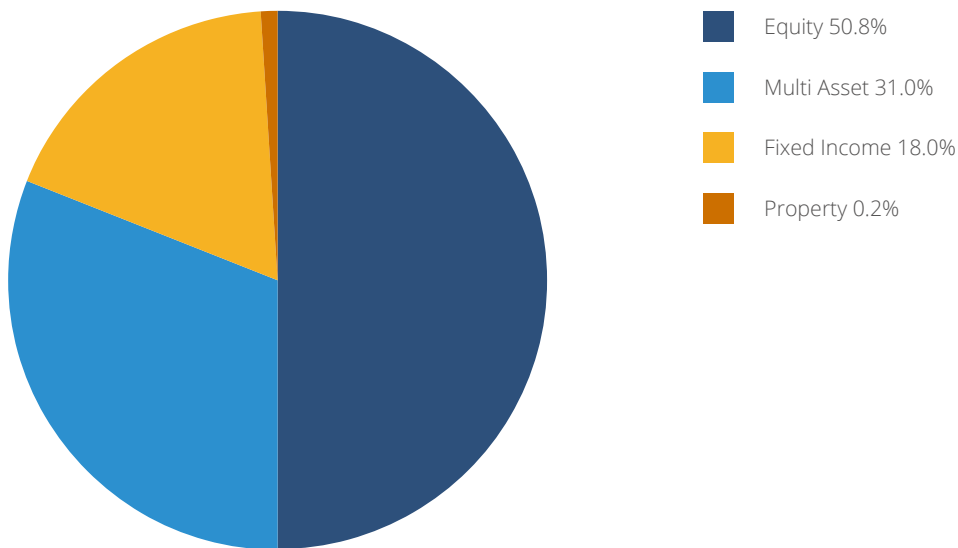
Pillar views over Q4 2020:



Outcome Activity



Asset Class Activity Views per IA Sector



This is not a recommendation to invest in a particular asset class or outcome.
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Views per IA Sector

IA Sector	Change from Q3 2020 %	Q4 2020 Views %
1 IA UK All Companies	▲ 5.5%	16.4%
2 IA Mixed Investment 20-60% Shares	▲ 2.9%	10.8%
3 IA Global	▼ -3.6%	9.3%
4 IA Sterling Strategic Bond	▲ 0.6%	8.4%
5 IA Asia Pacific Excluding Japan	▼ -2.5%	6.6%
6 IA UK Equity Income	▼ -0.3%	6.2%
7 IA Sterling Corporate Bond	▲ 2.0%	6.0%
8 IA Targeted Absolute Return	▲ 0.3%	5.0%
9 IA Mixed Investment 40-85% Shares	▼ -1.0%	3.8%
10 IA Flexible Investment	▲ 0.3%	3.7%
11 IA Japan	▼ -0.7%	2.8%
12 IA North America	▼ -0.7%	2.7%
13 IA Global Emerging Markets	▼ -0.7%	2.5%
14 IA Europe Excluding UK	▼ -0.8%	2.2%
15 IA Specialist	▼ -1.0%	1.9%
16 IA UK Smaller Companies	▲ 0.1%	1.6%
17 IA Global Equity Income	▼ -0.3%	1.3%
18 IA Mixed Investment 0-35% Shares	▼ -0.3%	1.3%
19 IA Global EM Bonds - Blended	▲ 0.5%	1.3%
20 IA China/Greater China	▼ -0.2%	1.2%
21 IA Global Bonds	▼ -0.1%	1.0%
22 IA Europe Including UK	▲ 0.8%	0.9%
23 IA Sterling High Yield	▼ -0.3%	0.9%
24 IA UK Index Linked Gilts	▼ -0.1%	0.6%
25 IA UK Direct Property	▶ 0.0%	0.2%
26 IA Volatility Managed	▼ -0.1%	0.2%
27 IA European Smaller Companies	▶ 0.0%	0.2%
28 IA North American Smaller Companies	▲ 0.1%	0.2%
29 IA Japanese Smaller Companies	▶ 0.0%	0.2%
30 IA Technology & Telecommunications	▼ -0.2%	0.2%
31 IA Unclassified	▼ -0.1%	0.1%
32 IA Short Term Money Market	▼ -0.2%	0.1%
33 IA UK Gilts	▼ -0.1%	0.1%
34 IA Asia Pacific Including Japan	▶ 0.0%	0.0%

This is not a recommendation to invest in a particular IA sector.

Top Viewed Fund by Outcome

Outcome	Top fund viewed
Capital Accumulation	AXA Framlington UK Select Opportunities ZI Acc
Capital Preservation	BNY Mellon Real Return Inst W Acc
Income	Aegon Diversified Monthly Income B Inc
Inflation Protection	First Sentier Global Listed Infrastructure B Inc GBP

Website statistics

Quarter 4 2020

Unique
website
visitors:
9,011

Page
views:
97,278

Source: Square Mile Academy of Funds as at 31st December 2020.

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