

# AR DB Wood ESG

Risk Profile: Medium

Date: 31 Mar 2026

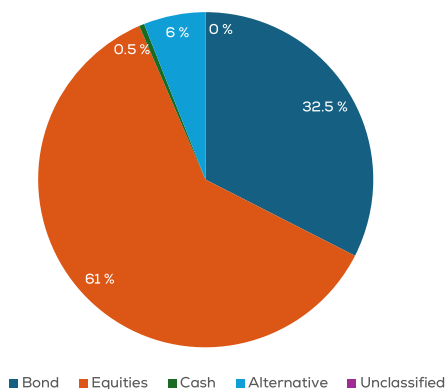
## PORTFOLIO OBJECTIVES

The medium risk portfolio aims to achieve long-term capital growth over a rolling five-year time horizon, with a focus on delivering this on a sustainable basis whilst protecting capital. It invests in a blend of active and passive funds diversified across equities, fixed income, absolute return and property, with risk managed through fund selection, asset allocation and quarterly rebalancing. The portfolio also follows a defined ESG framework, investing only in funds with underlying holdings rated 'A' or above and avoiding exposure to controversial sectors such as tobacco, weapons and nuclear related activities.

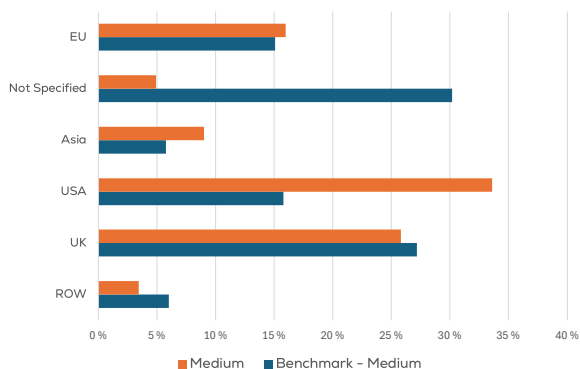
## PORTFOLIO CHARACTERISTICS

Inception Date:	01 May 2024
Portfolio Size:	£19.14 million
Portfolio Benchmark:	IA Mixed Investment 20%-60% Shares
Investment Management Charge:	0.15% per annum
Minimum Investment:	No Minimum
Currency:	GBP
Wrapper Accessibility:	ISA, OEIC, SIPP & Offshore Bond
On-going Fund Charge*:	0.38%
Risk Rating:	Medium

Asset Class Allocation



Geographic Allocation



## Performance Summary

	2026 YTD	2025	2024	2023	2022	2021
Portfolio	-1.96%	11.70%	-	-	-	-
Benchmark	-0.97%	10.18%	6.07%	6.81%	-9.47%	7.20%

## Portfolio Holdings: Top 10

Fund	Sector	Allocation
L&G FW ESG North America Ind	Equities	9.5%
Royal London ESG EM	Equities	8%
Artemis UK Select	Equities	6%
Man GLG Global Investment Grade Bond Opj	Bond	5.5%
Liontrust MIB	Bond	5.5%
Artemis SmartGARP European Equity	Equities	5%
JPM Global Equity Income	Equities	4.5%
BlackRock iShares UK Equity ESG Index	Equities	4.5%
Royal London Sterling Extra Yield Bond	Bond	4%
L&G Developed World Quality Factor Index	Equities	4%

Basis of return: total gross return net of annual management charges, bid to bid basis. The figures do not include any initial charge. You should be aware: pension and life fund performance differs from unit trust/OEIC performance, due to the underlying tax treatment. Past performance is not a reliable indicator of future returns. The value of any investment can go up and down, and investors may get back less than they invested. A small portion of the portfolios may be invested in illiquid assets, meaning you may not be able to buy or sell units in those assets during uncertain times.

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\*On-going Fund Charge = Total percentage fee charged by the underlying funds expressed as a weighted average.

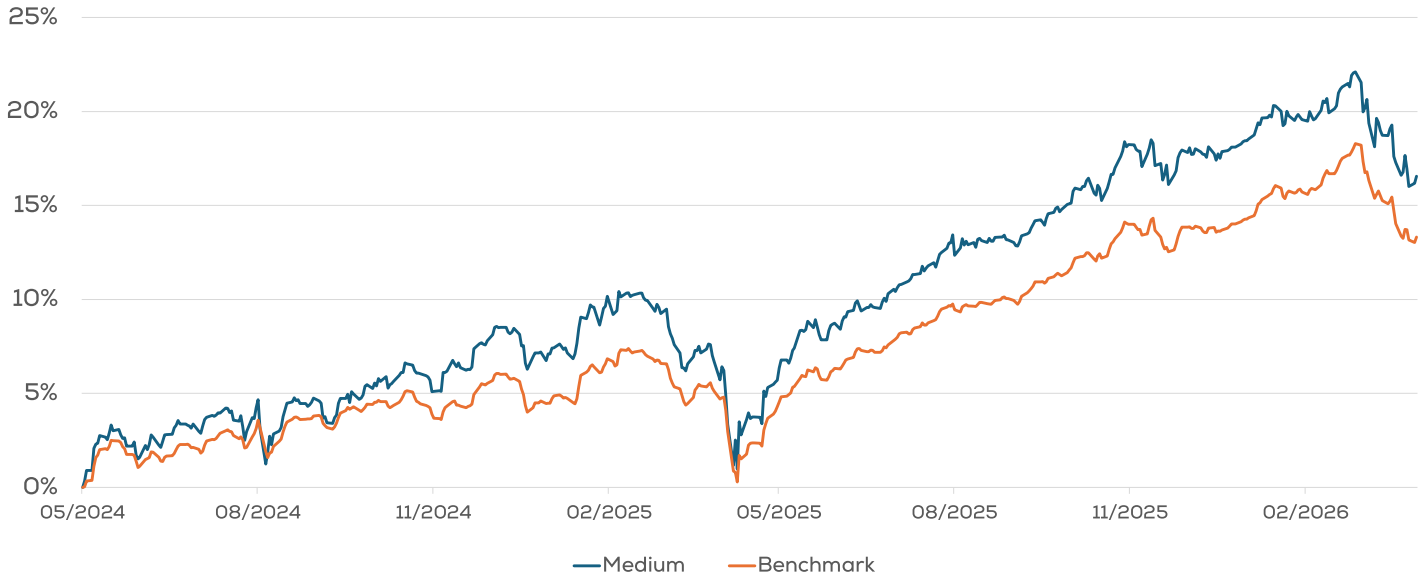


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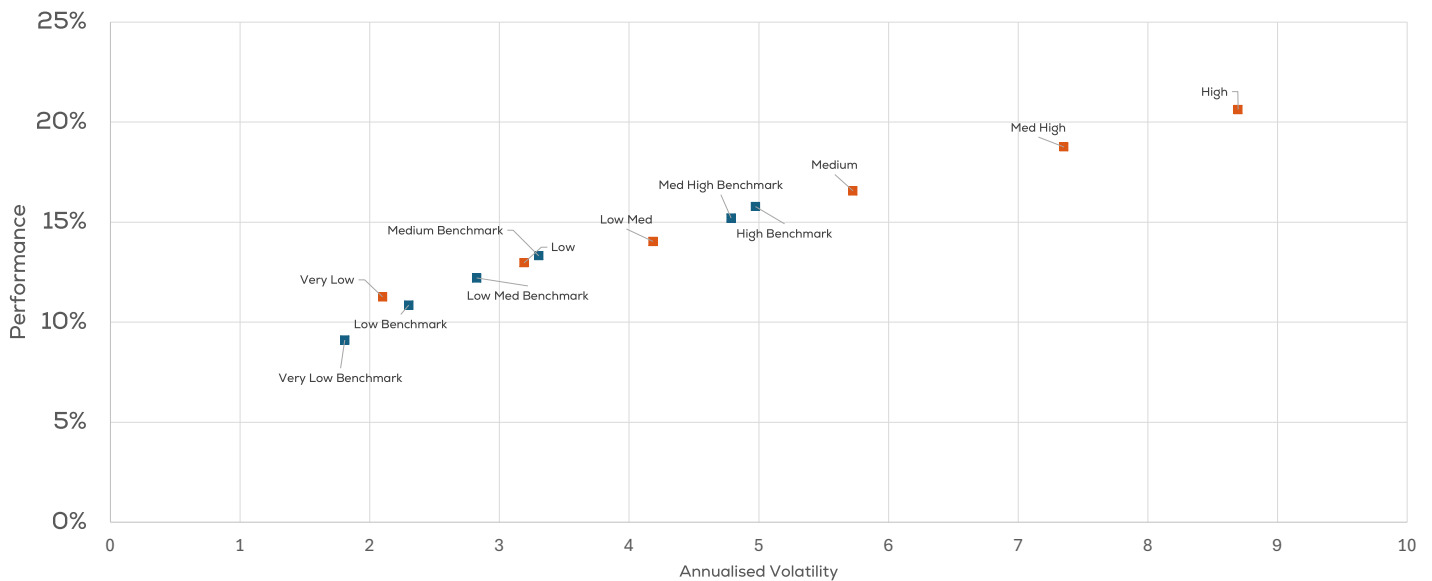
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## PORTFOLIO PERFORMANCE



	YTD	6 Months	1 Year	01/05/2024
<b>Portfolio</b>	-1.96%	1.28%	10.25%	16.56%
<b>Benchmark</b>	-0.97%	1.58%	8.24%	13.32%



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