

Portfolio Builder - Fund Weighting to Risk Category Resolver

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Portfolio Builder has a Fund Weighting to Risk Category Resolver.

This allows you to enter funds into the portfolio, and set what **Target Risk Category** you would like to achieve.

Click **Find Weightings**:

Fund Table

Fund Code	Fund Name	Promoter	Asset Allocation	Weighting %
KY9I	Aegon BlackRock 30/70 Equity and Bond Tracker	Aegon/Scottish Equitable	✓	20
PE12	Invesco UK Equity High Income (UK) Inc	Invesco Fund Managers Ltd	✓	20
P5PJ	Aegon Invesco Pensions European Equity (BLK) Pn H	Aegon/Scottish Equitable	✓	20
RU57	FNW Invesco Global Bond	FundsNetwork	✓	20
Cash				20

Remaining allocation: 0%
Total allocation: 100%

Portfolio Summary

Risk Profile Category: **Balanced (Low End)** Risk Rating: **5**

Minimum Gain in any 1 Year: **-12.66% or -£1,266.00**

Average Gain in any 1 Year: **3.13% or £313.00**

Maximum Gain in any 1 Year: **18.02% or £1,802.00**

The bar chart displays the minimum, mean and maximum gain values as a percentage for the portfolio.

Gain Type	Percentage
Minimum	-12.66%
Average	3.13%
Maximum	18.02%

Duplicate Portfolio ✕

Find Weightings

Use this calculator to determine the fund weightings to meet a target risk category for the portfolio.

Specify the target risk category to be achieved and the minimum weighting for ALL funds. The cash allocation weighting in the portfolio will NOT be adjusted in the calculation.

*Target Risk Category
Select Risk Category

Minimum Target Weighting in ALL Fund (%)
1.00%

Select the **Target Risk Category**:

Duplicate Portfolio ✕

Find Weightings

Use this calculator to determine the fund weightings to meet a target risk category for the portfolio.

Specify the target risk category to be achieved and the minimum weighting for ALL funds. The cash allocation weighting in the portfolio will NOT be adjusted in the calculation.

*Target Risk Category
Select Risk Category

- 1 - Very Cautious
- 2 - Cautious
- 3 - Moderately Cautious (Low End)
- 4 - Moderately Cautious (High End)
- 5 - Balanced (Low End)
- 6 - Balanced (High End)
- 7 - Moderately Adventurous (Low End)
- 8 - Moderately Adventurous (High End)

Set the **Minimum Target Weighting in ALL Fund (%)**

Duplicate Port ✕

Find Weightings

Use this calculator to determine the fund weightings to meet a target risk category for the portfolio.

Specify the target risk category to be achieved and the minimum weighting for ALL funds. The cash allocation weighting in the portfolio will NOT be adjusted in the calculation.

*Target Risk Category

4 - Moderately Cautious (High End)

Minimum Target Weighting in ALL Fund (%)

1.00%

Cancel

Calculate ⏏



Success!

Portfolio successfully optimised to your target Risk Category.



Fund Table

	Fund Code	Fund Name	Promoter	Asset Allocation	Weighting %
	KY9I	Aegon BlackRock 30/70 Equity and Bond Tracker	Aegon/Scottish Equitable		34
	PE12	Invesco UK Equity High Income (UK) Inc	Invesco Fund Managers Ltd		15
	PSPJ	Aegon Invesco Pensions European Equity (BLK) Pn H	Aegon/Scottish Equitable		9
	RU57	FNW Invesco Global Bond	FundsNetwork		22
				Cash	20
				Remaining allocation:	0%
				Total allocation:	100%

Portfolio Summary

Risk Profile Category: **Moderately Cautious (High End)** Risk Rating: **4**

Minimum Gain in any 1 Year
-10.58% or -£1,058.00

Average Gain in any 1 Year
2.64% or £264.00

Maximum Gain in any 1 Year
15.41% or £1,541.00

The bar chart displays the minimum, mean and maximum gain values as a percentage for the portfolio.

