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Secured Income Fund : Monthly Factsheet 07 July 2017. 0. 11/02/2020 ¦ 07:25am EST *: *: * Key Fund Characteristics. Monthly NAV total

return. NAV per ordinary share. Mid-price* Premium / discount. Dividend frequency. Dividend yield* Weighted average portfolio gross yield ... Morningstar,S&P Capital IQ et vwd Group

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Secured Income Fund : Monthly Factsheet 07 July 2017 ...
Unit trust, OEIC and fund prices, charts, news and Morningstar research, along with tools to help you find the best funds and to make great fund investing decisions.

Unit Trust, OEIC and fund prices, data and tools ¦ Morningstar
Factsheet: Fund Report: Axis Focused 25 Fund Direct Plan Growth Option: Focused Fund: 33.4000: 30-Oct-2020: Factsheet: Fund Report: Axis Gold Fund Direct Plan Dividend Payout option: Sector - Precious Metals: 16.8692: 30-Oct-2020: Factsheet: Fund Report: Axis Gold Fund Direct Plan Growth option: Sector - Precious Metals: 16.8534: 30-Oct-2020 ...

Mutual Fund Fact Sheets ¦ Morningstar India
A 5-star represents a belief that the stock is a good value at its current price; a 1-star stock isn't. If our base-case assumptions are true the market price will converge on our fair value ...

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American Funds Growth Fund of Amer F2 GFFFX - Morningstar
EUROPEAN INCOME FUND A GBP FUND FACTSHEET - AS AT 31 JULY 2017 OBJECTIVES INVESTMENT STYLE The Fund invests in wealth creating companies at attractive valuations. Building concentrated portfolios from the bottom up, unconstrained by the composition of the fund ’ s benchmark index, the managers seek to

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EUROPEAN INCOME FUND A GBP - waverton.co.uk
EUROPEAN CAPITAL GROWTH FUND I EUR FUND FACTSHEET - AS AT 31 JULY 2017 OBJECTIVES INVESTMENT STYLE The Fund invests in wealth creating companies at attractive valuations. Building concentrated portfolios from the bottom up, unconstrained by the composition of the fund ’ s benchmark index, the managers seek to

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EUROPEAN CAPITAL GROWTH FUND I EUR
Morningstar Category Global Large-Cap Blend Equity Fund Launch Date 15-Apr-2010 Unit Class Launch Date 11-May-2017 Fund Base Currency USD Share Class Currency GBP Total Fund Size (M) 12,680.85 USD Benchmark MSCI World NET TR in GBP Index ... iShares Developed World Index Fund (IE) Class D GBP JULY 2020 FACTSHEET

Factsheet iShares Developed World Index Fund (IE) Class D GBP
WAVERTON CAUTIOUS INCOME FUND P GBP FUND FACTSHEET - AS AT 31 JULY 2017 OBJECTIVES INVESTMENT STYLE The Fund has a multi-asset structure and invests in a diversified portfolio of equities, government and corporate bonds mainly through third party funds but also with some direct holdings. The Fund will maintain a

WAVERTON CAUTIOUS INCOME FUND P GBP
FUND FACTSHEET – JULY 2020 All data expressed as at 30 June 2020 unless otherwise stated This Fund is suitable for Investors who: • have high risk profile. • Up to 5% of NAV: Investments in cash and cash equivalents. Performance Chart Since Launch* Investment Manager Trustee TMF Trustees Malaysia Bhd Fund Category Feeder Fund Fund Type ...

In 1998, after thirteen years of providing investment advice for Smith Barney, Bill Schultheis wrote a simple book for people who felt overwhelmed by the stock market. He had discovered that when you simplify your investment decisions, you end up getting better returns. As a bonus, you gain more time for family, friends, and other pursuits. The Coffeehouse Investor explains why we should stop thinking about top-rated stocks and mutual funds, shifts in interest rates, and predictions for the economy. Stop trying to beat the stock market average, which few “ experts ” ever do. Instead, just remember three simple principles: Don ’ t put all your eggs in one basket. There ’ s no such thing as a free lunch. And save for a rainy day. By focusing more on your passions and creativity and less on the daily ups and downs, you will actually build more wealth—and improve the quality of your life at the same time.

With all of our focus on assets - and how much and when to allocate them - are we missing the bigger picture? Our book begins by reviewing the historical performance record of popular assets like stocks, bonds, and cash. We look at the impact inflation has on our money. We then start to examine how diversification through combining assets, in this case a simple stock and bond mix, works to mitigate the extreme drawdowns of risky asset classes. But we go beyond a limited stock/bond portfolio to consider a more global allocation that also takes into account real assets. We track 13 assets and their returns since 1973, with particular attention to a number of well-known portfolios, like Ray Dalio's All Weather portfolio, the Endowment portfolio, Warren Buffett's suggestion, and others. And what we find is that, with a few notable exceptions, many of the allocations have similar exposures. And yet, while we are all busy paying close attention to our portfolio's particular allocation of assets, the greatest impact on our portfolios may be something we fail to notice altogether...

The quick and easy way to manage money and achieve financial goals The recent economic meltdown has left people in terrible financial shape with little idea of how to turn things around. Using Morningstar's time-tested strategies and sensible approach to money management, Morningstar's 30-Minute Money Solutions: A Step-by-Step Guide to Managing Your Finances breaks down important financial tasks into do-able chunks, each of which can be accomplished in 30 minutes or less. The practical, no-nonsense book Lays out the tools to get organized, including how to create a filing and bill paying system Details how to find the best uses for one's money, as well as how to properly invest for savings, college, and retirement Other titles by Benz: Morningstar® Guide to Mutual Funds: Five Star Strategies for Success These are uncertain times. Morningstar's 30-Minute Money Solutions provides expert guidance on all aspects of personal money management, and it does so in quick, easily digestible steps.

Investors have too often extrapolated from recent experience. In the 1950s, who but the most rampant optimist would have dreamt that over the next fifty years the real return on equities would be 9% per year? Yet this is what happened in the U.S. stock market. The optimists triumphed. However, as Don Marquis observed, an optimist is someone who never had much experience. The authors of this book extend our experience across regions and across time. They present a comprehensive and consistent analysis of investment returns for equities, bonds, bills, currencies and inflation, spanning sixteen countries, from the end of the nineteenth century to the beginning of the twenty-first. This is achieved in a clear and simple way, with over 130 color diagrams that make comparison easy. Crucially, the authors analyze total returns, including reinvested income. They show that some historical indexes overstate long-term performance because they are contaminated by survivorship bias and that long-term stock returns are in most countries seriously overestimated, due to a focus on periods that with hindsight are known to have been successful. The book also provides the first comprehensive evidence on the long-term equity risk premium--the reward for bearing the risk of common stocks. The authors reveal whether the United States and United Kingdom have had unusually high stock market returns compared to other countries. The book covers the U.S., the U.K., Japan, France, Germany, Canada, Italy, Spain, Switzerland, Australia, the Netherlands, Sweden, Belgium, Ireland, Denmark, and South Africa. Triumph of the Optimists is required reading for investment professionals, financial economists, and investors. It will be the definitive reference in the field and consulted for years to come.

This survey examines the vibrant academic literature on environmental, social, and governance (ESG) investing. While there is no consensus on the exact list of ESG issues, responsible investors increasingly assess stocks in their portfolios based on nonfinancial data on environmental impact (e.g., carbon emissions), social impact (e.g., employee satisfaction), and governance attributes (e.g., board structure). The objective is to reduce exposure to investments that pose greater ESG risks or to influence companies to become more sustainable. One active area of research at present involves assessing portfolio risk exposure to climate change. This literature review focuses on institutional investors, which have grown in importance such that they have now become the largest holders of shares in public companies globally. Historically, institutional investors tended to concentrate their ESG efforts mostly on corporate governance (the “ G ” in ESG). These efforts included seeking to eliminate provisions that restrict shareholder rights and enhance managerial power, such as staggered boards, supermajority rules, golden parachutes, and poison pills. Highlights from this section: · There is no consensus on the exact list of ESG issues and their materiality. · The ESG issue that gets the most attention from institutional investors is climate change, in particular their portfolio companies ’ exposure to carbon risk and “ stranded assets. ” · Investors should be positioning themselves for increased regulation, with the regulatory agenda being more ambitious in the European Union than in the United States. Readers might come away from this survey skeptical about the potential for ESG investing to affect positive change. I prefer to characterize the current state of the literature as having a “ healthy dose of skepticism, ” with much more remaining to be explored. Here, I hope the reader comes away with a call to action. For the industry practitioner, I believe that the investment industry should strive to achieve positive societal goals. CFA Institute provides an exemplary case in its Future of Finance series (www.cfainstitute.org/research/future-finance). For the academic community, I suggest we ramp up research aimed at tackling some of the open questions around the pressing societal goals of ESG investing. I am optimistic that practitioners and academics will identify meaningful ways to better harness the power of global financial markets for addressing the pressing ESG issues facing our society.

Author Russel Kinnel walks readers through the handful of key factors they need to pick winning funds. Armed with the quantitative data and qualitative research, they will gain the confidence to pick great funds for the long-term. This book will be accompanied by a web-based tool created by Morningstar, which will enable readers to evaluate their own funds using Kinnel's criteria. Written in a fun and accessible manner, The Fund Spy offers Kinnel's unique insight as a 14-year Morningstar fund analyst. He speaks plainly about the conflicts that can go against investors' interests, explaining how to avoid traps and push out the slick sales pitches facing today's investors. He also offers several "10 lists," which provide quick answers to investors' most common questions (e.g., the Top 10 Funds to Recommend to Relatives, the 10 Best Contrarian Managers, the 10 Most Overrated Managers).

A practical and balanced guide to living your best life after retirement. Congrats on your retirement! But now what will you do with all that free time? With Keys to a Successful Retirement, you'll discover everything you need to know to get your retired years off to a great start. Covering topics like finances, embracing your passions, and dealing with feelings of aimlessness, grief, and depression that may crop up, this in-depth guide to retired living answers all the burning questions you want to ask--as well as those you're afraid to. Take a complete look at your newfound freedom and explore what it really means to have a successful retirement. This in-depth guide includes: Essential basics--Make sure you're retirement ready with advice for managing your savings, dealing with healthcare, staying fit, and more. Handling tough times--Dig into the more challenging aspects of retirement, like how to best handle the effects it can have on your mental health. Be your own boss--Get guidance that teaches you how to decide what you want your retirement to be and how you can lean into the things that you love. An exciting new chapter of your life is starting--get a helping hand ensuring it's the best it can be!

Since the Global Financial Crisis, a surge of interest in the use of finance as a tool to address social and economic problems suggests the potential for a generational shift in how the finance industry operates and is perceived. J.C. de Swaan seeks to channel the forces of well-intentioned finance professionals to improve finance from within and help restore its focus on serving society. Drawing from inspiring individuals in the field, de Swaan proposes a framework for pursuing a viable career in finance while benefiting society and upholding humanistic values. In doing so, he challenges traditional concepts of success in the industry. This will also engage readers outside of finance who are concerned about the industry's impact on society.

Inform your own analyses by seeing how one of the best data analysts in the world approaches analytics problems Analytics Stories: How to Make Good Things Happen is a thoughtful, incisive, and entertaining exploration of the application of analytics to real-world problems and situations. Covering fields as diverse as sports, finance, politics, healthcare, and business, Analytics Stories bridges the gap between the oft inscrutable world of data analytics and the concrete problems it solves. Distinguished professor and author Wayne L. Winston answers questions like: Was Liverpool over Barcelona the greatest upset in sports history? Was Derek Jeter a great infielder What's wrong with the

NFL QB rating? How did Madoff keep his fund going? Does a mutual fund ' s past performance predict future performance? What caused the Crash of 2008? Can we predict where crimes are likely to occur? Is the lot of the American worker improving? How can analytics save the US Republic? The birth of evidence-based medicine: How did James Lind know citrus fruits cured scurvy? How can I objectively compare hospitals? How can we predict heart attacks in real time? How does a retail store know if you're pregnant? How can I use A/B testing to improve sales from my website? How can analytics help me write a hit song? Perfect for anyone with the word " analyst " in their job title, Analytics Stories illuminates the process of applying analytic principles to practical problems and highlights the potential pitfalls that await careless analysts.