

QUARTERLY UPDATE

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Phoenix Wealth Elite Diversified Market Funds mapping to the Distribution Technology Dynamic Planner risk scale.

At Phoenix Wealth, we are committed to providing you with practical tools to help you assist your customers to understand their attitude to risk and how this relates to their investment decisions.

The Phoenix Wealth Elite Diversified Market range is managed to risk profiles on a 1-7 scale provided by EValue Investment Solutions. We recognise that investment professionals may use a number of different profiling tools, and for this reason, we have developed the capability to map our funds to other models. It is important to remember, however, that the funds are managed only to the EValue Investment Solutions 1-7 scale used by Phoenix Wealth and so the mapping to other tools, including Dynamic Planner, could change over time.

The Dynamic Planner approach to risk profiling is very different to the EValue Investment Solutions approach used by Phoenix Wealth. Nothing communicated in this mapping should be construed as investment advice. Phoenix Wealth makes no recommendation as to the suitability of these funds for individual investors: this remains the financial adviser's responsibility. This is a snapshot as at 30 June 2017.

The table below shows the risk rating of Phoenix Wealth Elite Diversified Market funds on the Distribution Technology Dynamic Planner scale.

Dynamic Planner rating

The ratings are provided by Distribution Technology.

Fund	Q1 2017	Q2 2017
PW Elite Diversified Market 2	3	3
PW Elite Diversified Market 3	4	4
PW Elite Diversified Market 4	5	5
PW Elite Diversified Market 5	6	6
PW Elite Diversified Market 6	7	7

Important information

Please note that this mapping is based on data as at 30.06.17. It is possible that this mapping may change as the funds' allocations and the model specification varies over time.

The value of investments and any income from them can go down as well as up and is not guaranteed. Your clients could get back less than they invest. Past performance is not a guide to future performance.

If you require further information on any of our funds, you can find the latest fund factsheets with details of fund performance and where funds are invested on our website phoenixwealth.co.uk/Adviser/Funds-and-Investments/Fund-Information-Centre/

For further information, please do not hesitate to contact our dedicated Contact Management Centre on 0345 129 9993.