



# FUND NAME CHANGES

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FOR FUNDS AVAILABLE THROUGH RETIREMENT WEALTH ACCOUNT, TRUSTEE INVESTMENT PLAN,  
INDIVIDUAL PENSION PLANS AND INVESTMENT BOND

Here you can find out about fund name changes to our insured funds.

**AS AT SEPTEMBER 2025**

**CLICK HERE TO SEE  
MONTHLY LIST FOR  
FUND NAME CHANGES**





# FUND NAME CHANGES – MONTHLY LIST

CLICK ON MONTHS  
TO VIEW ANY RESPECTIVE  
FUND NAME CHANGES



JANUARY 2025	>>>>>
FEBRUARY 2025	>>>>>
MARCH 2025	>>>>>
APRIL 2025	>>>>>
MAY 2025	>>>>>
JUNE 2025	>>>>>
JULY 2025	>>>>>
AUGUST 2025	>>>>>
SEPTEMBER 2025	>>>>>
OCTOBER 2025	>>>>>
NOVEMBER 2025	>>>>>
DECEMBER 2025	>>>>>

## JANUARY 2025



Fund group	Change details	Effective date	Old fund name and series	New fund name and series	MEXID	Sedol code	ISIN code	Citi code
<b>AXA Investment Managers UK Limited</b>	AXA changed the names of the funds, as shown, to remove the "Framlington" brand from the name. This is part of AXA IM's general rebranding of certain funds, some of which still include "Framlington" which is a name more associated with their equity-based funds.	24/01/2025	Phoenix Wealth AXA Framlington Global Sustainable Managed (Bond)	Phoenix Wealth AXA Global Sustainable Managed (Bond)	PTERFN	B64QN39	GB00B64QN391	L1F8
			Phoenix Wealth AXA Framlington Global Sustainable Managed	Phoenix Wealth AXA Global Sustainable Managed	WPAABY	B4393D5	GB00B4393D57	07SZ
			Phoenix Wealth AXA Framlington Global Sustainable Managed (S3)	Phoenix Wealth AXA Global Sustainable Managed (S3)	WPAABZ	B3Z7352	GB00B3Z73524	07T0
			Phoenix Wealth AXA Framlington Global Sustainable Managed (S4)	Phoenix Wealth AXA Global Sustainable Managed (S4)	WPMNDB	B4TFCB8	GB00B4TFCB82	KPA8

## FEBRUARY 2025

Fund group	Change details	Effective date	Old fund name and series	New fund name and series	MEXID	Sedol code	ISIN code	Citi code
<b>Schroder Unit Trusts Limited</b>	The name of the fund changed, as shown, to better align it with its new investment strategy and 'Sustainability Improvers' label. The Fund aims to invest in companies which demonstrate achieved emission reductions in line with Net Zero.	24/02/2025	Phoenix Wealth Schroder European Sustainable Equity (Bond)	Phoenix Wealth Schroder European Climate Transition (Bond)	AXAADK	BK35BM0	GB00BK35BM02	K8BN
			Phoenix Wealth Schroder European Sustainable Equity	Phoenix Wealth Schroder European Climate Transition	AXAADF	BK35BJ7	GB00BK35BJ72	K8BK
			Phoenix Wealth Schroder European Sustainable Equity (S3)	Phoenix Wealth Schroder European Climate Transition (S3)	AXAADG	BK35BK8	GB00BK35BK87	K8BL
			Phoenix Wealth Schroder European Sustainable Equity (S4)	Phoenix Wealth Schroder European Climate Transition (S4)	AXAADH	BK35BL9	GB00BK35BL94	K8BM

## MARCH 2025



Fund group	Change details	Effective date	Old fund name and series	New fund name and series	MEXID	Sedol code	ISIN code	Citi code
<b>FIL Investment Services (UK) Limited</b>	Fidelity have changed the fund names, as shown, to reflect regulatory requirements and expectations that include new rules relating to how funds can be named and marketed.	20/03/2025	Phoenix Wealth Fidelity Sustainable MoneyBuilder Income (Bond)	Phoenix Wealth Fidelity MoneyBuilder Corporate Bond (Bond)	PTFITY	B55HWD7	GB00B55HWD73	I4S4
			Phoenix Wealth Fidelity Sustainable MoneyBuilder Income	Phoenix Wealth Fidelity MoneyBuilder Corporate Bond	WPFDMO	B3SC194	GB00B3SC1942	085R
			Phoenix Wealth Fidelity Sustainable MoneyBuilder Income (S3)	Phoenix Wealth Fidelity MoneyBuilder Corporate Bond (S3)	WPFDMN	B3WQ1Y7	GB00B3WQ1Y72	085S
			Phoenix Wealth Fidelity Sustainable MoneyBuilder Income (S4)	Phoenix Wealth Fidelity MoneyBuilder Corporate Bond (S4)	PTFLTY	B55FHF8	GB00B55FHF80	I5Q3

## APRIL 2025

No fund name changes in April 2025.

## MAY 2025

Fund group	Change details	Effective date	Old fund name and series	New fund name and series	MEXID	Sedol code	ISIN code	Citi code
<b>Premier Portfolio Managers Limited</b>	The Premier Miton Multi-Asset Absolute Return fund merged into the Premier Miton Alternative Investments fund. At the same time, the name of the fund changed, as shown.	16/05/2025	Phoenix Wealth Premier Miton Multi-Asset Absolute Return (Bond)	Phoenix Wealth Premier Miton Alternative Investments (Bond)	AXGLTW	B8QB2K6	GB00B8QB2K62	GUZH
			Phoenix Wealth Premier Miton Multi-Asset Absolute Return	Phoenix Wealth Premier Miton Alternative Investments	AXGLTY	B44QVT7	GB00B44QVT79	GV1H
			Phoenix Wealth Premier Miton Multi-Asset Absolute Return (S3)	Phoenix Wealth Premier Miton Alternative Investments (S3)	AXGLTL	B8DYPK9	GB00B8DYPK95	GV1I
			Phoenix Wealth Premier Miton Multi-Asset Absolute Return (S4)	Phoenix Wealth Premier Miton Alternative Investments (S4)	AXGLMT	B8QB206	GB00B8QB2062	GV1J

JUNE 2025



Fund group	Change details	Effective date	Old fund name and series	New fund name and series	MEXID	Sedol code	ISIN code	Citi code
Schroder Unit Trusts Limited	The Schroder UK Alpha Income fund merged into the Schroder Prime UK Equity fund. At the same time, the name of the fund changed, as shown.	18/06/2025	Phoenix Wealth Schroder UK Alpha Income (Bond)	Phoenix Wealth Schroder Prime UK Equity (Bond)	AXAADO	BL95LB0	GB00BL95LB09	KJYE
			Phoenix Wealth Schroder UK Alpha Income	Phoenix Wealth Schroder Prime UK Equity	AXAAGD	BL95LM1	GB00BL95LM14	KJYF
			Phoenix Wealth Schroder UK Alpha Income (S3)	Phoenix Wealth Schroder Prime UK Equity (S3)	AXAAEI	BL95LX2	GB00BL95LX29	KJYG
			Phoenix Wealth Schroder UK Alpha Income (S4)	Phoenix Wealth Schroder Prime UK Equity (S4)	AXAAFB	BL95M62	GB00BL95M620	KJYH

JULY 2025

No fund name changes in July 2025.

AUGUST 2025

No fund name changes in August 2025.

Fund group	Change details	Effective date	Old fund name and series	New fund name and series	MEXID	Sedol code	ISIN code	Citi code
<b>Martin Currie Investment Management Limited</b>	Martin Currie is aligning the majority of its business with ClearBridge Investments (another investment manager within the Franklin Templeton group), ahead of retiring the Martin Currie brand in late 2025.	30/09/2025	Phoenix Wealth Martin Currie UK Mid Cap (Bond)	Phoenix Wealth FTF ClearBridge UK Equity (Bond)	AXAADQ	BL95LC1	GB00BL95LC16	KJXI
			Phoenix Wealth Martin Currie UK Mid Cap	Phoenix Wealth FTF ClearBridge UK Equity	AXAAGE	BL95LN2	GB00BL95LN21	KJXJ
			Phoenix Wealth Martin Currie UK Mid Cap (S3)	Phoenix Wealth FTF ClearBridge UK Equity (S3)	AXAAEJ	BL95LY3	GB00BL95LY36	KJXK
			Phoenix Wealth Martin Currie UK Mid Cap (S4)	Phoenix Wealth FTF ClearBridge UK Equity (S4)	AXA AFC	BL95M73	GB00BL95M737	KJXL
	The fund names have changed, as shown, to reflect the brand transition.	30/09/2025	Phoenix Wealth Martin Currie UK Smaller Companies (Bond)	Phoenix Wealth FTF ClearBridge UK Smaller Companies (Bond)	AXAADT	BL95LD2	GB00BL95LD23	KJXM
			Phoenix Wealth Martin Currie UK Smaller Companies	Phoenix Wealth FTF ClearBridge UK Smaller Companies	WPUKSM	B3R1FY5	GB00B3R1FY54	087S
			Phoenix Wealth Martin Currie UK Smaller Companies (S3)	Phoenix Wealth FTF ClearBridge UK Smaller Companies (S3)	WPRUSC	B3SWWQ8	GB00B3SWWQ82	087T
			Phoenix Wealth Martin Currie UK Smaller Companies (S4)	Phoenix Wealth FTF ClearBridge UK Smaller Companies (S4)	AXAAFF	BL95M84	GB00BL95M844	KJXN

Phoenix Life Limited, trading as Phoenix Wealth, is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Phoenix Life Limited is registered in England No. 1016269 and has its registered office at: 1 Wythall Green Way, Wythall, Birmingham, B47 6WG.

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