8AM GLOBAL AQ Global 60

Aug 2026

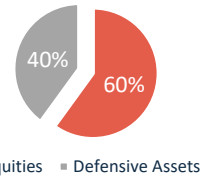
Investment Objective & Process

The objective of the 8AM AQ Global 60 portfolio is to deliver long term capital growth via fixed exposure to 60% global equities.

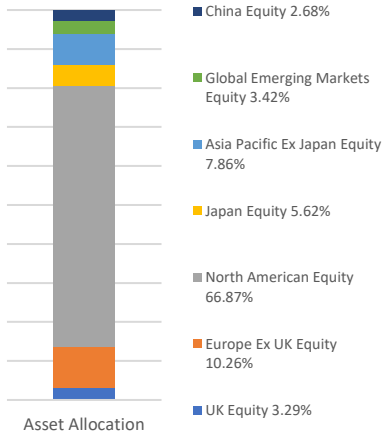
In addition, the aim of the 8AM AQ MPS is to deliver consistent outperformance of industry benchmarks, within pre-defined risk parameters. Our quantitative fund screening helps to identify managers delivering outperformance and holds these positions until relative performance declines or a superior choice becomes available.

Long-term strategic asset allocation is set based on MSCI AWCI weights whilst the 8AM Investment Team provides tactical sector tilts utilising large samples of the position of peer multi-asset strategies.

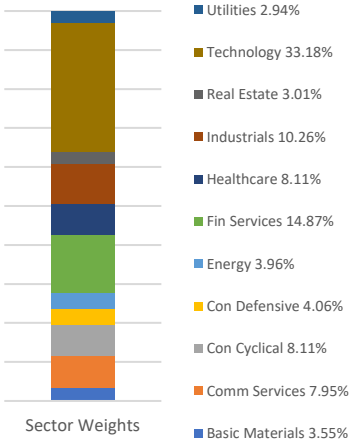
Equity Allocation



AQ Global Equity Geographic

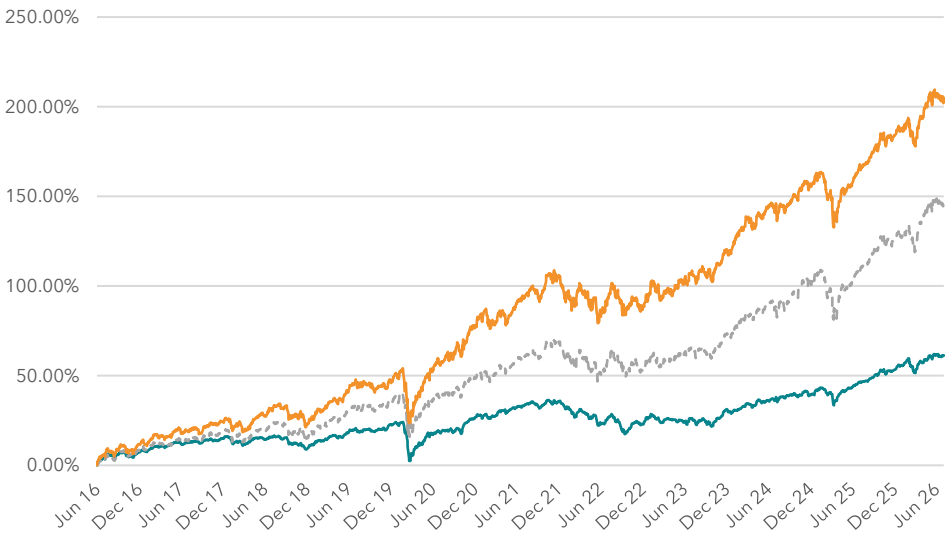


AQ Global Equity Sector



Top Ten Portfolio Positions	
HSBC FTSE All-World Index Fund	15.00%
abrdn Global Corporate Bd Scrnd Tracker	6.50%
abrdn Short Dated Global Corp Bond Tk	5.50%
HSBC American Index Fund	5.25%
Vanguard Global Bd Idx	4.50%
abrdn World Equity Enhanced Index Fund	3.75%
Allianz Best Styles Global AC Equity Fd	3.75%
Jupiter Merian Global Equity Fund	3.75%
L&G Global 100 Index Trust	3.75%
Fidelity Index Sterling Corporate Bd Fd	3.50%

Performance	6 Months	1 Year	3 Years	5 Years	YTD
8AM AQ Global 60*	**6.28%**	**13.87%**	**46.72%**	**58.17%**	**7.31%**
Benchmark	3.59%	9.92%	27.78%	21.12%	5.10%



8AM AQ Global 60* (Simulated and Live)	202.00%
Benchmark (IA Mixed Investment 20-60%)	60.86%
Long Term Performance Target	143.85%

Model Inception	30th June 2024
Portfolio OCF	0.26%
AMC	0.15%
Investor Risk Profile	High
Minimum Investment	£15,000
Investment Manager	8AM Global Limited
Underlying Ex-Ante Transaction Cost	0.08%

*Source: Simulated data (Static Asset Allocation – Live AQ Fund Picks) – 30/06/2016 – 30/06/2024
Source: Daily Portfolio Performance Data: – 30/06/2024 Onwards

Returns Disclosure

The returns shown are cumulative and net of the holdings' management fees and expenses based on the cheapest share class available; however do not include the fees charged by 8AM Global Limited, the Adviser or the Platform. The returns are calculated through 8AM Global Limited and assume a single trading date in relation to any changes to underlying holdings which will not necessarily be the date that actual platform transactions occurred.

Therefore, the actual performance experienced by an investor will be lower once the above referenced charges and other assumptions have been taken into account. The performance shown is provided for illustrative purposes only and should not be viewed as the performance of an actual account.

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