

## Parallel Passive Portfolio Range

### Passive Cautious Growth

The investment objective of the Parallel Passive Cautious Growth Portfolio is to achieve capital growth over the medium term (5 years plus), without compromising investors' tolerance for risk, by maintaining a preference towards lower risk assets such as cash and fixed income, and less emphasis on higher risk assets such as equities. The Portfolio consists of a range of low-cost passive instruments (including tracker funds and exchange traded funds) to provide exposure to a diversified blend of assets which may include equities, bonds, commercial property, commodities and cash.

**Benchmark:** As a comparative benchmark the Portfolio uses Consumer Price Index (CPI) + 3% over a rolling three-year period.

### Asset Allocation



Equities	51.00%
Fixed Interest	39.00%
Property	7.00%
Cash	3.00%

### Passive Balanced Growth

The investment objective of the Parallel Passive Balanced Growth Portfolio is to achieve capital growth over the medium term (5 years plus), by adopting a balanced exposure between lower risk assets, such as cash and fixed income, and higher risk assets such as equities. The Portfolio is made up of a range of low-cost passive instruments (including tracker funds and exchange traded funds) to create a diversified blend of assets which may include equities, bonds, commercial property, commodities and cash.

**Benchmark:** As a comparative benchmark the Portfolio uses Consumer Price Index (CPI) + 3% over a rolling three-year period.

### Asset Allocation



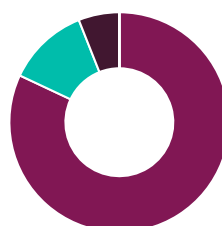
Equities	66.00%
Fixed Interest	28.00%
Property	6.00%

### Passive Adventurous Growth

The investment objective of the Parallel Passive Adventurous Growth Portfolio is to achieve capital growth over the medium to long term (5-10 years) by providing a high level of exposure to higher risk assets such as equities, and less emphasis on lower risk assets such as cash and fixed income. The Portfolio is made up of a range of low-cost passive instruments (including tracker funds and exchange traded funds) to give exposure to a diversified blend of assets which may include equities, bonds, commercial property, commodities and cash.

**Benchmark:** As a comparative benchmark the Portfolio uses Consumer Price Index (CPI) + 5% over a rolling three-year period.

### Asset Allocation



Equities	82.00%
Fixed Interest	12.00%
Property	6.00%

## About Parallel Investment Management

Parallel was formed in 2012 and is part of the Fidelity Group, a diversified financial services group providing a range of services and benefits to private investors, companies, charitable institutions, and professional partners. From its base in Bath, Parallel provides discretionary investment management through a range of investment solutions with the aim of generating attractive real returns over the long term, supported by the delivery of excellent service.

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