

Past Performance Document

Investment strategy: Balanced Defensive discretionary investment strategy

Product manufacturer: Utmost PanEurope dac

Production date: 01/01/2025

Past performance is not a reliable indicator of future performance. Markets could develop very differently in the future. It can help you to assess how the fund has been managed in the past.

What is being shown?

This chart shows the strategy's performance as the annual percentage loss or gain per year over the last 10 years. This uses the asset allocation as described in the Balanced Defensive discretionary investment strategy SID to show the performance of this strategy for the past 10 years.

This is a simulation of your strategy.

This strategy was created to be a guide for potential Utmost PanEurope policyholders who have similar strategies created for them by their discretionary fund manager, based on strategies of existing Utmost policyholders. This strategy was created in 2022.

This is a simulated performance.

Performance is shown before deduction of ongoing charges and calculated on an annual basis. Any entry and exit charges are excluded from the calculation.

