



King & Shaxson Model Portfolios
Risk Rated by Defaqto

We are delighted to announce that King & Shaxson Ethical Investing have received various Defaqto Risk Ratings across our Model Portfolios.

Defaqto is an independent financial information business and technology business, helping financial institutions and financial advisers make better informed decisions. They have been doing this for over 25 years.

We also wanted to help advisers make better informed decisions. Defaqto independently rate risk-bound multi-asset funds with their risk levels, enabling advisers to match portfolios to their clients' risk profiles. Risk Ratings are numbered from 2 to 10, where 2 is a solution that has a very cautious investment approach, and 10 a speculative approach. These match Defaqto's client Risk Profiles. King & Shaxson's Risk Ratings range from a more cautious balanced risk profile of 4 to a more adventurous level of 8.

We hope our ratings will help those clients and financial planning businesses who are keen to integrate Ethical investment portfolios and have embedded Defaqto Engage as part of their overall risk analysis.

The Risk Ratings can be found below:

Funds MPS

K&S Cautious	K&S Income	K&S Balanced	K&S Growth	K&S Adventurous

Direct Equity MPS

K&S Cautious Green	K&S Light Green	K&S Mid Green	K&S Dark Green

Disclaimer

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