

# Introducing Schroders

Schroders is one of Europe's largest independent investment managers, and use their expertise to invest your money in the Foresters Stakeholder (Schroders) Managed 1 Fund.

Schroders are a dedicated asset manager with a strong heritage and culture based on over 200 years' experience of investment markets. By the end of December 2021 they held over £615.2 billion of funds under management, of which over £1 billion is held in the Foresters funds. With an international network spanning 37 locations, Schroders has the perspective and expertise to identify investment potential wherever it is located. They continually look to identify and develop new investment opportunities.

## Fund objectives

The Foresters Stakeholder (Schroders) Managed 1 Fund follows a conservative fund strategy designed to provide growth potential without undue risk. Growth is targeted by an active approach to managing investment risk, whilst protection against inflation is also taken into account.

The fund gives access to a professionally managed portfolio of UK and international company shares along with global government and corporate securities and cash. They aim to outperform the IA Mixed Investment 20-60% shares sector median and to generate capital growth over the medium-term through an active asset allocation strategy, and the individual performances of underlying investments. In short this means that no more than 60% of the fund will be held in shares with a minimum 40% in more stable investments like bonds and other fixed interest holdings.

## What are the Benefits?

Schroders is one of the largest investment firms in Europe. They are a global business, managed locally, keeping customers' needs at the heart of everything they do.

You'll be joining over a quarter of a million of our customers who have money held in this fund. You can be assured that the fund management team at Schroders will not only aim to safeguard your investments against the impacts of market changes, but also identify new investment opportunities.

## Asset allocation (% of fund)

The chart opposite shows the average mix of investments held within our Foresters Stakeholder (Schroders) Managed 1 Fund during 2021, highlighting a risk-controlled balanced approach.

The performance and asset breakdown of the fund can be found in regular Investment Bulletins, found on [foresters.com](https://www.foresters.com)

