

Aegon Core Portfolios Risk Mapping

Aegon Core Portfolios is a range of seven risk-managed, multi-asset funds designed to deliver long-term growth.

To help you determine the suitability of the Aegon Core Portfolios range of funds for your clients, we have worked with a number of the leading risk profiling providers to map the funds to their risk rating scale.

The tables below outline the risk ratings that have been assigned to each fund by the relevant model.

Risk ratings are intended as a guide and should not form the sole basis for advice to invest in a particular fund.



Aegon Core Portfolio funds	Dynamic Planner Risk Rating
Conservative	3
Cautious	3
Balanced	4
Balanced Plus	5
Growth	6
Growth Plus	7
Adventurous	8

Source: Dynamic Planner as at quarter 4 2018. For more information on Dynamic Planner and how they risk map investments, visit www.dynamicplanner.com/risk-profiled-funds



Aegon Core Portfolio funds	Defaqto Risk Rating
Conservative	2
Cautious	3
Balanced	4
Balanced Plus	6
Growth	7
Growth Plus	8
Adventurous	9

Source: Defaqto as at 20 November 2018. For more information on Defaqto risk ratings, visit www.defaqto.com/fund-managers/risk-ratings/more-about-risk-mappings

Aegon Core Portfolio funds

Conservative Cautious Balanced Balanced Plus Growth Growth Plus Adventurous

Synaptic Risk Rating

Synaptic Risk Profile

Cautious Moderately Cautious (Low End) Balanced (Low End) Balanced (High End) Moderately Adventurous (High End) Adventurous Very Adventurous

 Source: Synaptic as at quarter 4, 2018. For more information on Synaptic risk ratings, visit synaptic.co.uk/research-tools/synaptic-risk
Risk Tolerance Score Ranges
Risk Comfort / Discomfort Zones for Each Portfolio

Aegon Core Portfolio funds	Growth Assets	Best Fit	Too Much Risk	Marginal	OK Risk	Marginal	Too Little Risk
Conservative	14%	0-36	N/A	0-19	20-36	37-43	>43
Cautious	34%	37-47	<30	30-36	37-48	49-54	>54
Balanced	49%	48-56	<40	40-45	46-57	58-63	>63
Balanced Plus	64%	57-65	<49	49-54	55-67	68-74	>74
Growth	78%	66-74	<58	58-63	64-77	78-88	>88
Growth Plus	89%	75-86	<64	64-70	71-89	90-100	N/A
Adventurous	100%	87-100	<72	72-79	80-100	N/A	N/A

© PlanPlus Global Inc. Risk tolerance scores were mapped to the funds' strategic asset allocations as at 15/10/2018. The mappings are only for use by financial advisors licensed to use FinaMetrica Risk Profiling Toolkit™, are for guidance purposes only and do not constitute financial or investment advice. Financial advisers must satisfy themselves that the funds' current asset allocations reflect the risk/return expectations of the funds when mapped. Aegon does pay PlanPlus for the mappings in the table however these mappings are calculated independently by PlanPlus. For more information on FinaMetrica risk ratings, visit www.riskprofiling.com.

All mappings are accurate as at the dates shown but may change in future. The risk ratings are provided by third parties and may differ from Aegon ratings.

Fund codes

To help you search for and research the Aegon Core Portfolios, please find below the fund codes and shortnames for each fund.

For Aegon Retirement Choices (ARC) and Aegon One Retirement (AOR) investors

Aegon Core Portfolio funds	ARC shortname	ISIN	Sedol	CitiCode	Aegon mnemonic
Conservative	Conserv Core Pfl ARC Pn	GB00B68SM234	B68SM23	00JI	ZDH
Cautious	Cautious Core Port ARC Pn	GB00B8J4KB99	B8J4KB9	G1WV	ZMD
Balanced	Balanced Core Port ARC Pn	GB00B8J4K977	B8J4K97	G1WT	ZMB
Balanced Plus	Bal Plus Core Port ARC Pn	GB00B8J4K860	B8J4K86	G1WR	ZLZ
Growth	Growth Core Portf ARC Pn	GB00B8J4K753	B8J4K75	G1WP	ZLY
Growth Plus	Gth Plus Core Port ARC Pn	GB00B8J4K647	B8J4K64	G1WN	ZLX
Adventurous	Advntur Cr Port ARC Pn	GB00B8J4K530	B8J4K53	G1WL	ZLW

Other investors

Aegon Core Portfolio funds	ISIN	Sedol	CitiCode	Aegon mnemonic
Conservative	GB00B4W2PF11	B4W2PF1	GSM8	SPC
Cautious	GB00B8J4K423	B8J4K42	G1WU	CCP
Balanced	GB00B8J4K316	B8J4K31	G1WS	POB
Balanced Plus	GB00B8J4K209	B8J4K20	G1WQ	BPP
Growth	GB00B8J4K191	B8J4K19	G1WO	GPC
Growth Plus	GB00B8J4K084	B8J4K08	G1WM	GPL
Adventurous	GB00B8J4JZ60	B8J4JZ6	G1WK	CPA

Contact us

For more information on this and other fund ranges available please contact your usual Aegon representative.

Past performance is not a guide to future performance. Capital is at risk. The value of investments can go down as well as up and investors could get back less than the amount invested.



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