

## press release

23 November 2009

### Fund in Focus: Jupiter Merlin Balanced portfolio

**Andy Parsons, Advice team manager at The Share Centre explains how investors looking for a balanced return along with the potential for global exposure could benefit from the Jupiter Merlin Balanced portfolio.**

“This fund of funds aims to achieve long-term capital growth with income by investing predominantly in unit trusts, OEICs, Exchange Traded Funds and other collective investment schemes across several management groups. The underlying funds invest in international equities, fixed interest stocks, commodities and property.

“The Jupiter Merlin range of funds is managed by one of the most well-known and respected fund of funds teams within the industry. The team, consisting of three managers, John Chatfeild-Roberts, Algy Smith-Maxwell and Peter Lawery, has been together since 1999; originally working at Lazard before moving to Jupiter in 2001.

“Unlike many others, the team looks at the investment picture from a top-down perspective. Firstly, they identify those key factors that will affect the macroeconomic picture as well as those involved in cyclical turning points. Having decided upon a strategic view and outlook, the managers then look to identify those fund managers that have the most appropriate investment approach.

“In terms of performance, the fund is ranked 1<sup>st</sup> quartile on a cumulative basis over 3 years and 5 years, while on a year to date basis it has returned 17.29% along with a current yield of 3.10%.

“The Jupiter Merlin Balanced portfolio is ideal for those investors wishing to provide a balanced return along with the potential for global exposure. Investors also benefit from the additional diversification of managers selecting the underlying funds, hence further removing them from direct investment risk with shares in individual companies.”



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**Note to editors:**

As one of The Share Centre's Platinum 120 funds there is no initial charge when investing in the Jupiter Merlin Balanced portfolio and customers will not be charged dealing commission.

**About The Share Centre's Platinum 120 range:**

The Share Centre launched its Platinum 120 funds range in June 2009 in order to help investors identify the funds with the best long-term prospects and strong management. Customers who invest in a Platinum 120 fund will benefit from no purchase commission on all funds and no initial charge on almost 90%. Please visit [www.share.com/p120](http://www.share.com/p120) to view the full Platinum 120 range. Please be aware that this may require registration.

# thesharecentre:

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## Risk Warnings:

Investing in general, and the products and services mentioned above may not be suitable for all: if in doubt, individuals should seek independent financial advice. The value of investments and the income from them can go down as well as up and investors may not get back their original investment. Past performance is not a reliable indicator of future performance.

The bases and levels of taxation relating to ISAs, CTFs and SIPP's are subject to change and the value of these tax allowances may depend upon the circumstances of the individual.

## About The Share Centre:

The Share Centre was established in 1990 to provide value-for-money share services for private investors. Its range of services includes buying and selling shares (by Internet, telephone and post) and a comprehensive share administration and safe custody service. Tax-efficient investment 'wrappers' including ISAs, CTFs and SIPP's are also available.

The Share Centre's Advice Team provides comment on market sectors, individual shares and funds on [www.share.com](http://www.share.com). Access is available to customers and registered users of the site. Registration is free. To understand how our Advice team arrive at their views please read our [Investment Research Policy](#).

In addition, account customers can receive individual telephone advice on UK-listed shares and on funds traded via the CoFunds trading platform.

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