

press release

8 March 2010

Diversify your portfolio with funds this ISA season

- Make the most of the increased ISA allowance
- Highlights three funds to aid ISA portfolio diversification

With the 2010/2011 tax year fast approaching, Andy Parsons, Advice team manager at The Share Centre, explains why investors should fully utilise the increased ISA allowance and highlights three funds to help with diversification.

“In 2009, the Government upped the maximum investment into a Stocks and Shares ISA to £10,200 for investors aged 50 or over. However, come the new tax year all investors aged 18 or over will be able to benefit from the increase. This means investors will be able to squirrel away an additional £3,000 a year from the taxman.

“With interest rates at historic lows, savers and investors alike should plan to make the most of the improved allowance. While see-sawing markets have left some wary of investing in equities, those not ready to invest directly into the stock market could consider funds as a way of reducing their overall risk.

“Funds by their very nature help to diversify a portfolio because they include a variety of equities and other investments. With a diversified portfolio, returns from better performing investments can help offset those which aren’t performing as well.”

PLATINUM 120* FUND RECOMMENDATIONS FOR 2010

LOW RISK

L&G Dynamic Bond

“This fund is ideal for those seeking additional income and not wishing to increase their risk profile significantly. Its overriding objective is to achieve a total return in terms of both income and capital growth, through a more flexible investment strategy than a standard corporate bond

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fund. The fund is still relatively new, having only launched in April 2007. Year-to-date, it has returned 2.46% compared to the sector average of 1.91%.”

MEDIUM RISK

Invesco Perpetual High Income

“This fund suits those who are unsure which UK income fund to choose, and for those who prefer to follow a manager with a proven track record. Managed by Neil Woodford, the fund has a strong emphasis on investing in solid defensive companies. Despite struggling in 2009 as the fund was defensively aligned, when viewed over a five year cumulative position the fund is ranked number one in the sector, returning 49.29%.”

HIGHER RISK

First State Global Emerging Market Leaders

“Over the last few years emerging market funds have become the buzzword, as investors have swooped to benefit from the meteoric rise in some of these economies. This fund offers higher risk investors the ideal way to invest in these regions, given its managers and analysts are involved with the participants of these markets on a daily basis. It invests in around 30-to-60 stocks, favouring large and mid cap companies with the idea being they are held for the longer term, thereby reducing turnover.”

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Note to editors:

*About the Platinum 120:

Customers of The Share Centre wishing to invest in any of its Platinum 120 funds could benefit from 0% initial charge on 90% of the funds. In addition, customers will not be charged purchase commission on any Platinum 120 fund.

Our Platinum 120 list of funds was produced in June 2009 with the aim of helping investors to 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 to view the full Platinum 120 range. Please be aware that this may require registration.

A Funds ISA – with no administration fee

The Share Centre’s Funds ISA has no administration fee and has been specially developed for those who wish to only invest in Funds (Unit Trusts and OEICs) within their ISA. Customers who purchase one of the discounted Platinum 120 funds through the stockbroker’s Funds ISA will only have to pay for the amount they wish to invest in the fund. Funds will still be subject to an annual management charge, renewal commission, and dealing commission will be charged on sales.

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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 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 are also available.

The Share Centre's Advice team provides comment on market sectors, individual shares and funds on 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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