

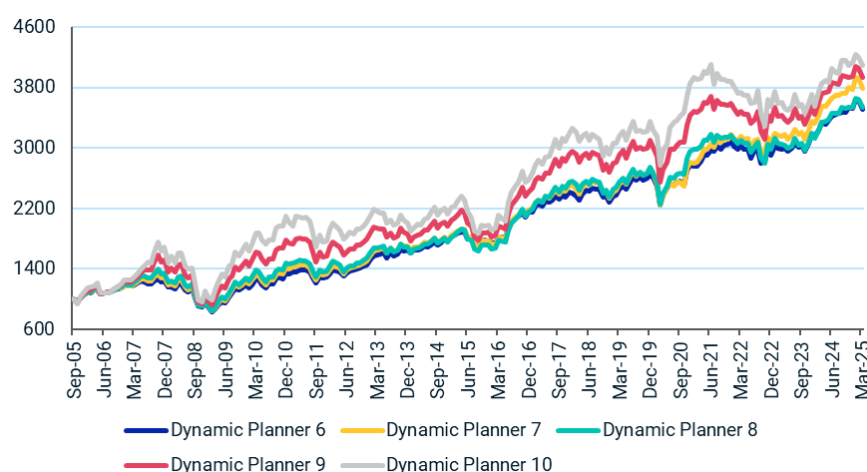
MSCI Multi-Asset Indexes: Dynamic Planner Indexes 6-10 (GBP)

Dynamic Planner (DP) was launched in 2003 and today is one of the UK's most-widely used risk profiling and asset allocation investment processes supporting thousands of financial advisers and planners. Dynamic Planner's asset and risk model has produced a set of model portfolios at an asset class level, optimized to deliver good returns for one of ten investor risk levels from low-risk to high-risk. MSCI has developed a series of ten indexes designed to represent the risk and return characteristics of these strategies by targeting a pre-determined target risk range.

For a complete description of the index methodology, please see [Index methodology - MSCI](#)

Cumulative index performance (GBP – Net)

SEPTEMBER 2005 – MARCH 2025



Annual performance (%)

YEAR	DP 6	DP 7	DP 8	DP 9	DP 10
2024	10.61	12.70	10.95	11.19	11.46
2023	9.50	9.64	7.06	5.89	4.37
2022	-5.88	-3.65	-6.00	-6.47	-8.34
2021	11.57	13.27	7.39	4.47	0.74
2020	4.63	2.88	7.66	10.65	14.80
2019	16.09	17.03	16.46	15.61	14.73
2018	-5.78	-7.19	-7.51	-8.12	-8.46
2017	12.56	15.20	18.51	21.23	23.86
2016	21.21	23.29	25.48	28.03	30.63
2015	0.45	-0.79	-2.38	-4.06	-7.18
2014	7.24	5.05	4.14	5.44	5.81
2013	13.01	13.29	9.48	3.84	-0.45
2012	12.61	11.92	12.33	13.98	14.08
2011	-3.42	-5.29	-7.46	-11.67	-15.71
2010	13.14	14.19	15.29	18.17	21.71

Index performance

NET TOTAL RETURNS (%) MARCH 31, 2025

INDEX	1 Month	3 Months	1 Year	Year to Date	ANNUALIZED			
					3 Years	5 Years	10 Years	Since Sep 30, 2005
Dynamic Planner 6	-3.13	-0.03	5.35	-0.03	5.01	9.39	6.51	6.66
Dynamic Planner 7	-3.50	0.20	6.64	0.20	6.29	11.05	7.16	7.07
Dynamic Planner 8	-2.84	-0.19	5.73	-0.19	4.43	9.34	6.51	6.69
Dynamic Planner 9	-2.69	-0.22	6.00	-0.22	4.17	9.07	6.42	7.29
Dynamic Planner 10	-2.60	-1.16	6.10	-1.16	2.99	8.12	5.95	7.49

The MSCI Multi-Asset Indexes: Dynamic Planner module was launched on July 24, 2019. Data prior to the launch date is back-tested data (i.e. calculations of how the index might have been performed over that time period had the index existed). There are frequently material differences between back-tested performance and actual results. Past performance – whether actual or back-tested – is no indication or guarantee of future performance.

Index risk and return characteristics

(%)MARCH 31, 2025

ANNUALIZED STANDARD DEVIATION

INDEX	3 Years	5 Years	10 Years	Since Sep 30, 2005
Dynamic Planner 6	8.74	8.63	9.15	10.59
Dynamic Planner 7	9.40	9.36	10.29	11.90
Dynamic Planner 8	10.29	9.87	11.03	12.95
Dynamic Planner 9	11.48	10.88	12.12	14.74
Dynamic Planner 10	12.79	12.12	13.37	16.65

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