

**Client:** Thesis Asset Management  
**Source:** Professional Adviser (Main)  
**Date:** 06 November 2008  
**Page:** 38  
**Circulation:** 12005  
**Size:** 5489.6  
**AVE:** 584cm2

## HOW THE GROUP TABLES ARE CALCULATED

Professional Adviser's group HOT 100 rankings identify the investment houses achieving the most consistent performance across their range of fund offerings.

The tables show the performance of individual fund groups compared to their peers. This is done over rolling monthly periods for the one year table and rolling quarterly periods for the three year tables. They are calculated on the percentile rankings over those

periods across the house's entire fund range where the funds have a minimum investment of £25,000 or less and which are offered to the retail investor. The lower the percentile figure the more consistent the performance for the group as a whole. Groups are split into those with more than 15 funds on offer to the retail sector and those with less than 15 funds. Groups with less than five funds on offer (based on the above criteria) are excluded from the tables.

▲ Up from last week   ▼ Down from last week   ● New entrant   ► Same as last week

### ONE YEAR PROMOTERS OFFERING MORE THAN 15 PRODUCTS TO THE RETAIL SECTOR

Position	Promoter	Average %ile
▲ 1	Scottish Widows	46.36
▼ 2	BNY Mellon	47.06
► 3	BlackRock	47.16
▼ 4	Threadneedle	47.27
▲ 5	M&G	48.34
▲ 6	AXA Framlington	48.67
▼ 7	Insight Investments	48.79
▼ 8	Henderson	49.06
▲ 9	Capita	49.28
▲ 10	Baillie Gifford	49.63
▼ 11	Jupiter	49.87
▲ 12	Investec	49.90
▲ 13	Invesco Perpetual	50.42
▲ 14	SWIP	50.59
▼ 15	Aberdeen	50.65
▼ 16	Prudential	50.74
► 17	Credit Suisse	50.77
▼ 18	Fidelity	50.80
▼ 19	Legal and General	50.98
▲ 20	Resolution	51.12
▲ 21	Schroder	51.48
▼ 22	Aegon	51.56
▼ 23	Halifax	51.62
▲ 24	Standard Life Investments	51.64
▼ 25	F&C	51.66
▼ 26	Baring	51.73
▼ 27	Gartmore	51.97
► 28	HSBC	52.44
▼ 29	Norwich	52.49
▲ 30	Skandia IM	53.10
▼ 31	Allianz Global Inv	53.41
▲ 32	SocGen	53.55
▼ 33	AXA	54.07
▼ 34	JPMorgan	54.86
▼ 35	Old Mutual	55.12
► 36	New Star	55.92

### PROMOTERS OFFERING LESS THAN 15 PRODUCTS TO THE RETAIL SECTOR

Position	Promoter	Average %ile
▲ 1	Sarasin	43.11
▲ 2	Morgan Stanley	45.14
▲ 3	First State	45.22
▲ 4	Margetts	45.88
▲ 5	Cazenove	45.97
▲ 6	Lincoln	45.97
▼ 7	Ecclesiastical	46.99
▲ 8	Singer & Friedlander	47.10
▲ 9	Thesis	48.27
▼ 10	RBS/NatWest	48.33
▼ 11	Franklin Templeton	48.39
▲ 12	WAY	48.95
▲ 13	Solus	49.92
▲ 14	T.Bailey	50.02
▲ 15	Neptune	50.10
▲ 16	Close	50.18
▼ 17	GAM	50.35
▼ 18	CIS	50.82
▲ 19	Marlborough	51.34
▲ 20	Thames River	51.47
▼ 21	Royal London	51.52
▼ 22	Liontrust	51.70
▲ 23	Premier	51.98
▼ 24	Martin Currie	52.77
▼ 25	St James's Place	52.97
▲ 26	Legg Mason	53.24
▲ 27	Melchior	54.04
▲ 28	UBS	54.27
▼ 29	Smith&Williamson	54.49
▲ 30	MLC	54.56
▼ 31	Lazard	54.73
▼ 32	Artemis	55.42
▼ 33	Santander	55.46
▼ 34	SVM	56.26
▼ 35	Rensburg	57.03
▼ 36	Rathbone	59.70

**THREE YEARS**  
**PROMOTERS OFFERING MORE THAN 15**  
**PRODUCTS TO THE RETAIL SECTOR**

Position	Promoter	Average %ile
▲ 1	Jupiter	46.32
▲ 2	M&G	46.71
▼ 3	Threadneedle	46.72
▼ 4	BNY Mellon	47.01
▼ 5	BlackRock	47.13
▶ 6	Baring	48.14
▲ 7	Capita	48.86
▼ 8	Aberdeen	48.91
▲ 9	JPMorgan	49.15
▶ 10	Aegon	50.07
▲ 11	Investec	50.20
▲ 12	Gartmore	50.37
▲ 13	Schroder	50.39
▲ 14	Baillie Gifford	50.41
▲ 15	Insight Investments	50.56
▲ 16	Invesco Perpetual	50.57
▼ 17	F&C	50.66
▼ 18	SWIP	50.71
▼ 19	Henderson	50.79
▲ 20	New Star	50.81
▼ 21	Scottish Widows	50.91
▼ 22	Prudential	50.97
▲ 23	Resolution	50.98
▼ 24	Legal and General	51.10
▼ 25	Allianz Global Inv	51.13
▲ 26	Old Mutual	51.24
▼ 27	Norwich	51.25
▲ 28	Standard Life Investments	51.37
▼ 29	Fidelity	51.57
▼ 30	Credit Suisse	51.60
▼ 31	SocGen	51.67
▼ 32	HSBC	51.92
▶ 33	Skandia IM	52.90
▶ 34	AXA	54.86
▲ 35	AXA Framlington	55.42
▼ 36	Halifax	56.19

**PROMOTERS OFFERING LESS THAN 15**  
**PRODUCTS TO THE RETAIL SECTOR**

Position	Promoter	Average %ile
▲ 1	Sarasin	38.61
▶ 2	First State	39.62
▼ 3	Ecclesiastical	39.67
▲ 4	Neptune	42.19
▲ 5	SVM	44.24
▲ 6	Margetts	45.11
▼ 7	Liontrust	45.91
▲ 8	Thesis	46.50
▼ 9	Franklin Templeton	47.20
▲ 10	Royal London	47.23
▼ 11	Cazenove	47.55
▲ 12	Thames River	47.95
▲ 13	Lincoln	48.65
▲ 14	Martin Currie	49.08
▼ 15	Smith&Williamson	49.11
▲ 16	WAY	49.25
▼ 17	RBS/NatWest	49.84
▲ 18	Legg Mason	49.98
▲ 19	Marlborough	50.13
▼ 20	Rensburg	51.22
▲ 21	T.Bailey	51.55
▲ 22	Artemis	51.56
▼ 23	Singer & Friedlander	51.61
▼ 24	Lazard	51.71
▲ 25	Solus	52.39
▼ 26	Close	52.47
▼ 27	Morgan Stanley	52.81
▼ 28	CIS	52.92
▲ 29	Premier	52.92
▼ 30	St James's Place	53.45
▼ 31	Santander	53.62
▲ 32	MLC	53.81
▲ 33	Melchior	54.80
▼ 34	Rathbone	55.21
▼ 35	GAM	55.83
▼ 36	UBS	55.96