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30 April 2007  
FOR IMMEDIATE RELEASE

**ADVISER FUND INDEX:**

**Beckett Financial Services and Rowan Plc join the AFI Panel**

Financial Express welcomes two new panellists to its **Adviser Fund Index (AFI)** as Beckett Financial Services and Rowan Plc sign up in time for the Spring re-balancing.

The AFI Panel is made up of investment professionals, including specialist investment adviser firms representing more than £40 billion of client assets under management. Panellists are currently submitting their portfolios for the next re-balancing which takes effect on 1<sup>st</sup> May.

Beckett Financial Services and sister company Beckett Investment Management have been established in the UK advice market for twenty years and are one of the largest independent financial advisers in the country. Beckett's client base is more than 10,000 strong with funds under management totalling more than £200 million. Tim Hines, Associate Director - Wealth Management for Beckett says: "We are delighted to be invited to become a contributor to the Adviser Fund Index. The AFI is now highly regarded as an IFA composite index and a valuable barometer to the trends in the world of retail funds".

Rowan Plc, with a strong presence in the South West, has a dedicated investment arm which sits at the heart of its financial planning service. Tim Cockerill, Head of Research for Rowan, with 18 years investment experience, says: "Rowan is delighted to be joining the AFI panel which we see as an increasingly valuable tool for clients. Fund selection is crucial in successful portfolio management and this is where Rowan dedicates considerable time and resources".

Index or IMA Sector Average	% Total Return Performance since start of AFI (01/11/04 to 26/04/07)*
<b>AFI Aggressive Index</b>	<b>60.51</b>
FTSE APCIMS Growth Portfolio	45.68
IMA Active Managed	49.15
<b>AFI Balanced Index</b>	<b>50.59</b>
FTSE APCIMS Balanced Portfolio	40.26
IMA Balanced Managed	43.77
<b>AFI Cautious Index</b>	<b>36.98</b>
FTSE APCIMS Income Portfolio	31.59
IMA Cautious Managed	27.54

*\*Total Return - bid to bid, net income reinvested.  
Source: Financial Express Analytics*



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**Paul Wynne, Financial Express head of marketing and communication, says:**

“The expertise and experience from both Beckett Financial Services and Rowan Plc will provide invaluable contributions to the Adviser Fund Index, offering advisers and investors further insight about fund research, analysis and selection. As benchmarks, the AFI Aggressive, the AFI Balanced, and the AFI Cautious indices have consistently outperformed fund sectors and traditional market measures, proving that skilled financial planning can add real value to an investment portfolio.”

The Adviser Fund Index (AFI) is aggregated from the recommended portfolios of a panel of leading UK investment adviser firms. Based on a selection of the funds actually recommended to clients, the AFI Aggressive, AFI Balanced, and AFI Cautious portfolios carry real-life credibility, and provide insight in terms of the benefits of holding top quality funds. AFI constituents, performance and charts, as well a full explanation of the AFI methodology are available at [www.trustnet.com/general/afi.asp](http://www.trustnet.com/general/afi.asp).

**ENDS**

**For AFI performance data, charts and further information about the survey, please contact:**

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