Whitechurch Investments Client Area Dashboard

Whitechurch Securities Ltd
WEALTH MANAGERS

Your Valuation
Portfolio Reports
Performance Sheets

Whitechurch Securities Ltd
WEALTH MANAGERS

Roger Derry

- Your Valuation
- Portfolio Reports
- Performance Sheets
- Alerts
- Your Profile / Log out
- Help

Key facts: As at 30th September 2017

Portfolio Management Service
Monthly Distribution

All Portfolio Management Strategies

Launch date:
10th March 2003

Strategy aim:
To produce a rising income and capital growth over the long-term

Key objectives
This strategy is aimed at long-term investors seeking a sustainable level of above average income and genuine prospects for capital growth. The strategy provides accessto a balanced portfolio of collective investments, investing in equity, property and fixed interest funds. The strategy aims to provide an initial target yield of 4% gross. Income can b.e paid out monthly or reinvested. There is also the facility to receive fixed regular income

Risk rating
5/10 - Balanced
Minimum investment
- Direct Portfolio - £3,000
- ISA - £3,000 (including transfers)
- £250 per month (ISA, Direct Portfolio)

Income
Current target gross yield of 4%, distributed monthly or reinvested back into the portfolio

Asset allocation - Portfolio breakdown

- 24.1% **UK Equities**
- 17.7% European Equities
- 16.7% UK Fixed Interest
- 13.1% Global Fixed Interest
- 8.2% North American Equities
- 7.3% Property
- 6.4% Others

Source: Financial Express 30th September 2017. Asset allocation numbers may not add up to 100% due to rounding. Negative asset allocation can occur due to the underlying positions employing hedging strategies.

Current holdings
Artemis Global Income
CF Woodford Equity Income
Invesco Perpetual Monthly Income Plus
Jupiter Strategic Bond
Kames Property Income
Legg Mason IF RARE Global
Infrastructure Income
Liontrust European Enhanced Income
Schroder Income Maximiser
TwentyFour Corporate Bond

Performance Table	0-12m	12-24m	24-36m	36-48m	48-60m	5 Year Cumulative	Volatility (3 Years)
PMS Monthly Distribution - Risk 5	5.2%	2.1%	2.7%	6.1%	8.5%	27.0%	5.4%
ARC £ Balanced Asset PCI	6.4%	10.0%	0.8%	5.2%	8.1%	34.2%	4.7%

Investment manager's comment

Looking back:

Best performing holding:

Worst performing holding:

Portfolio Changes

Looking ahead

The strategy produced a marginal return of 0.1% over the third quarter, underperforming the ARC £ Balanced Private Client Index, which was up by 1.0%. The lack of return generated was due to income producing investments underperforming due to concerns of rising interest rates.

All Portfolio Management Strategies

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WEALTH MANAGERS

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Portfolio Management Service
Monthly Distribution

All Portfolio Management Strategies

Launch date: 10th March 2003

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Key objectives This strategy is aimed at long-term investors seeking a sustainable level...

See full details

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Performance Table

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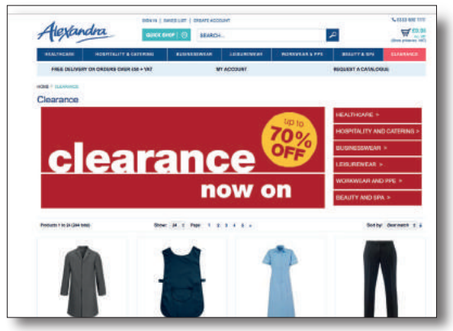
Portfolio Changes

Looking ahead

All Portfolio Management Strategies

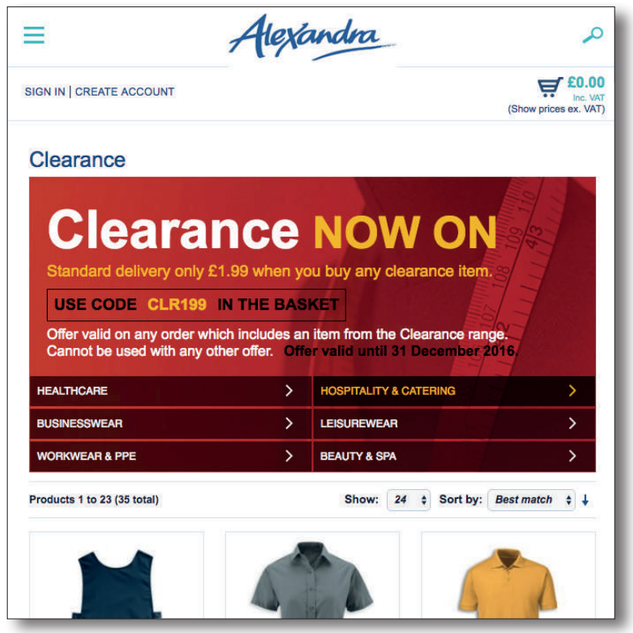
Alexandra Clothing

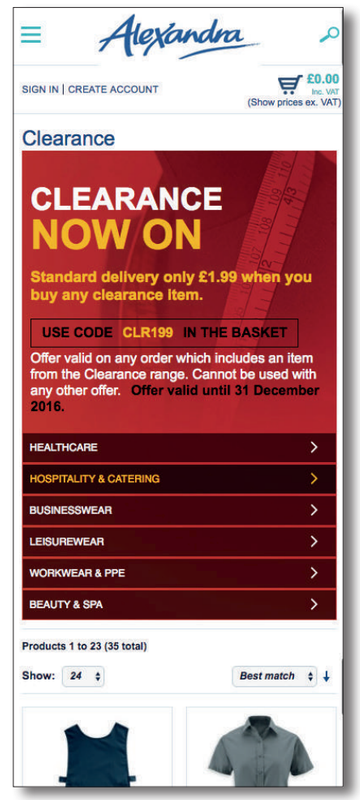
UI / Prototypes / Wireframes / html & css coding

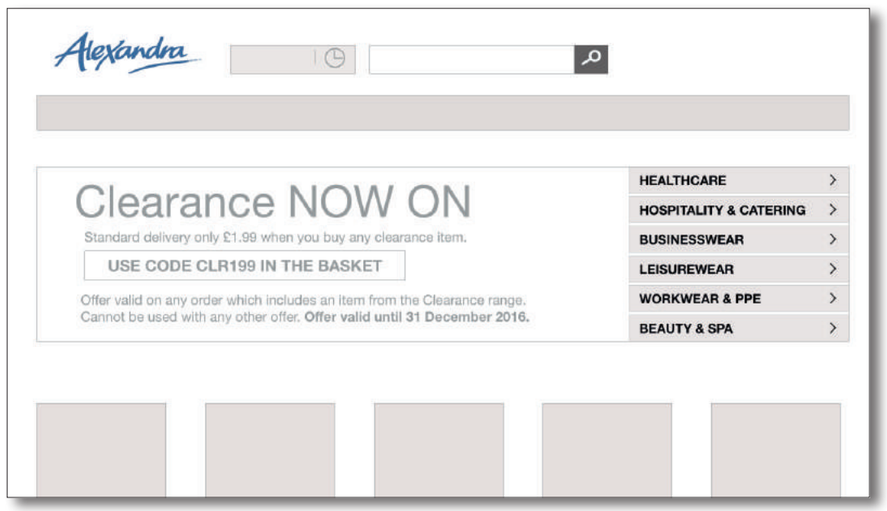


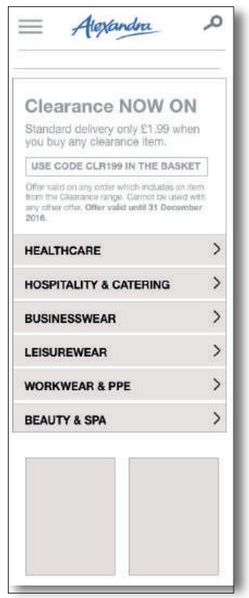
Problem:
Not responsive, graphic based and not SEO-friendly
- so needed graphic department to update.

Solution:
Responsive, CSS & html solution
- non-designers could update text based sales messages which is SEO-friendly.

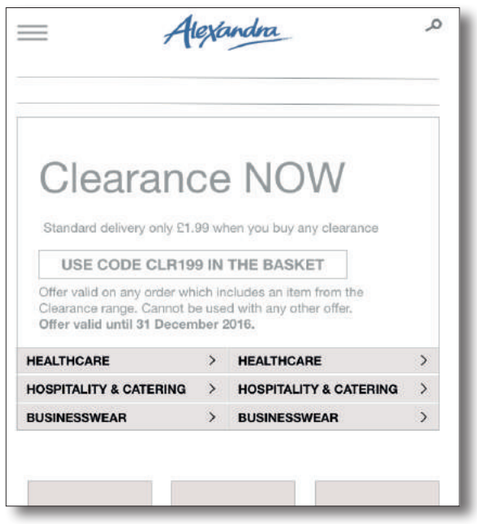


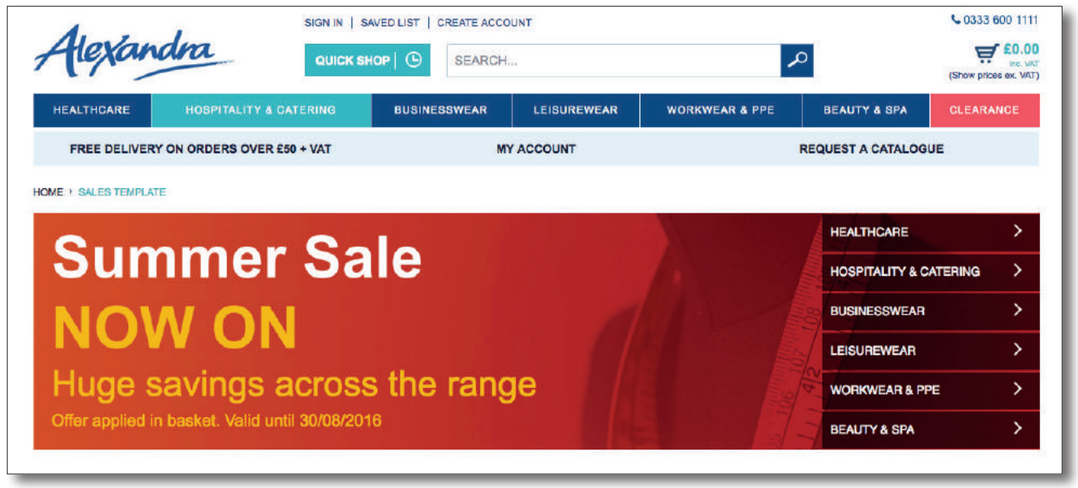






Wireframes:
Using Adobe XD



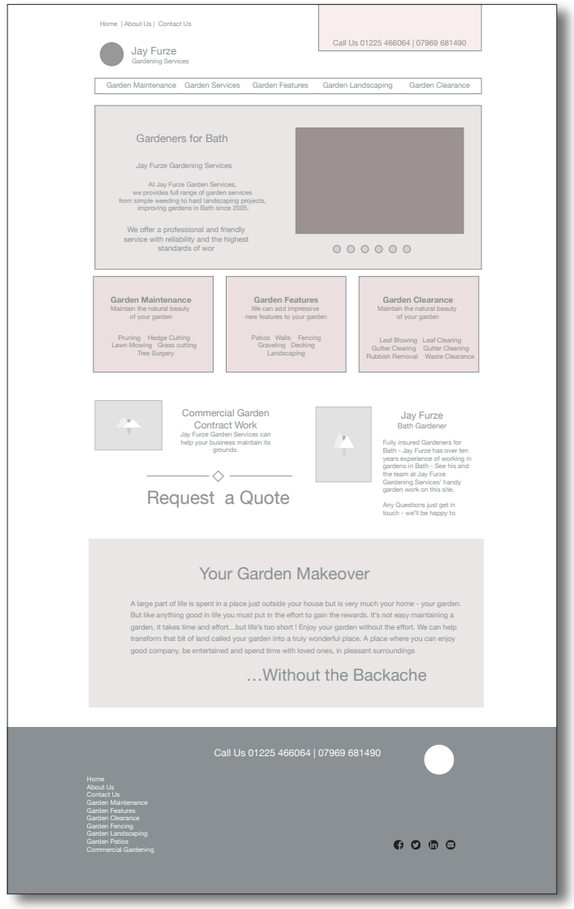


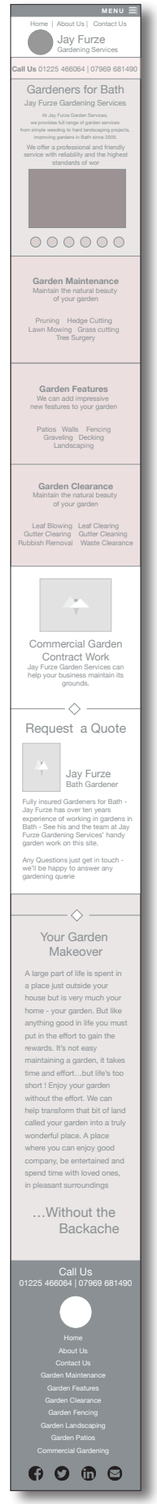
Alexandra Clothing

UI / Style Guide / Code Library

Jay Furze Gardeners

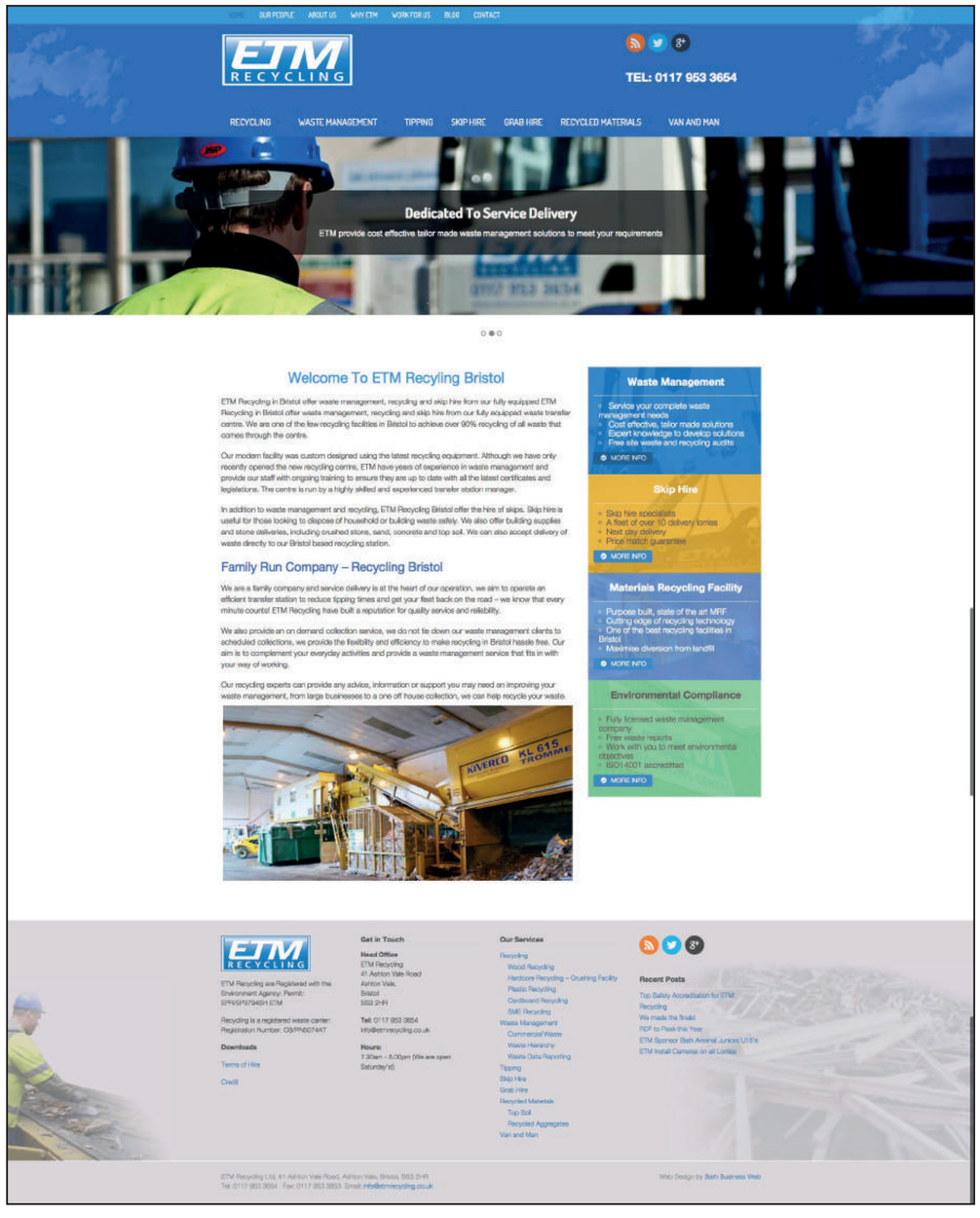
WordPress Child Theme / Responsive Web Design
/ CSS & HTML / Wireframes

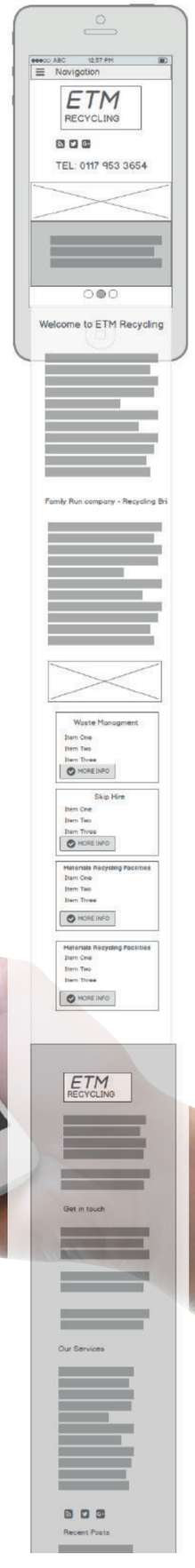


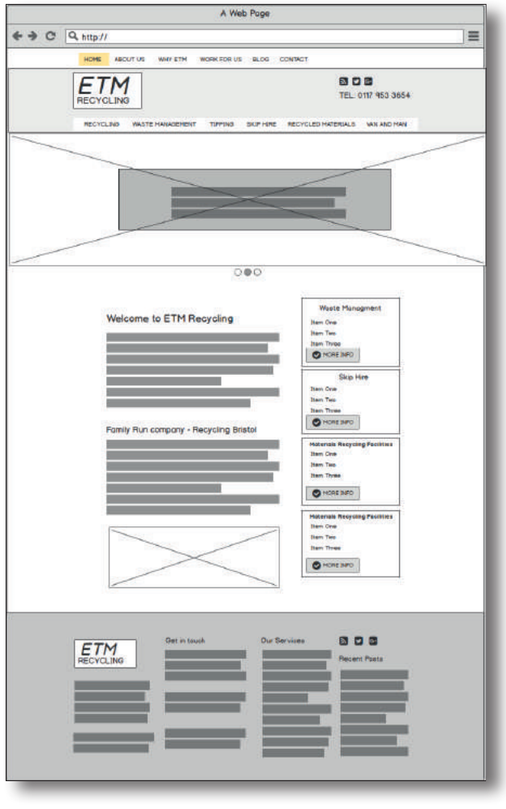


ETM Recycling

WordPress Child Theme / Responsive Web Design / CSS & HTML / Wireframes

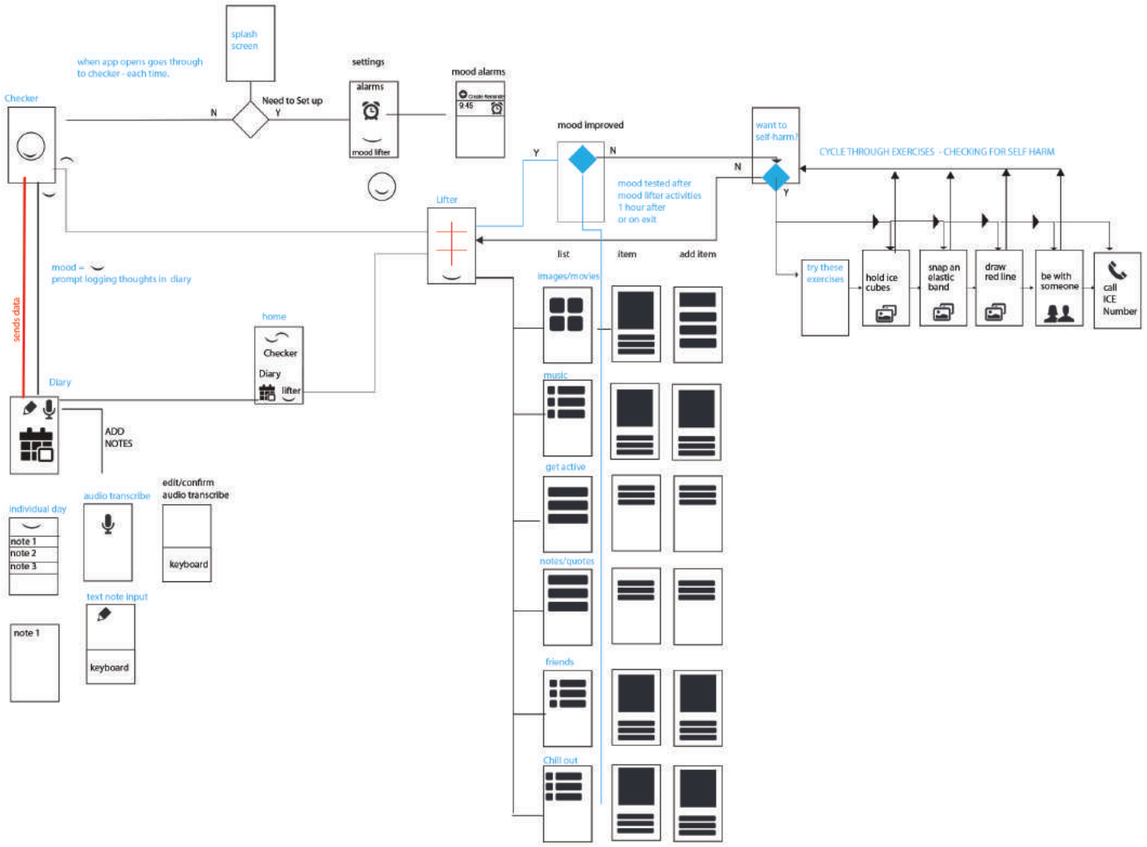






Blue ICE

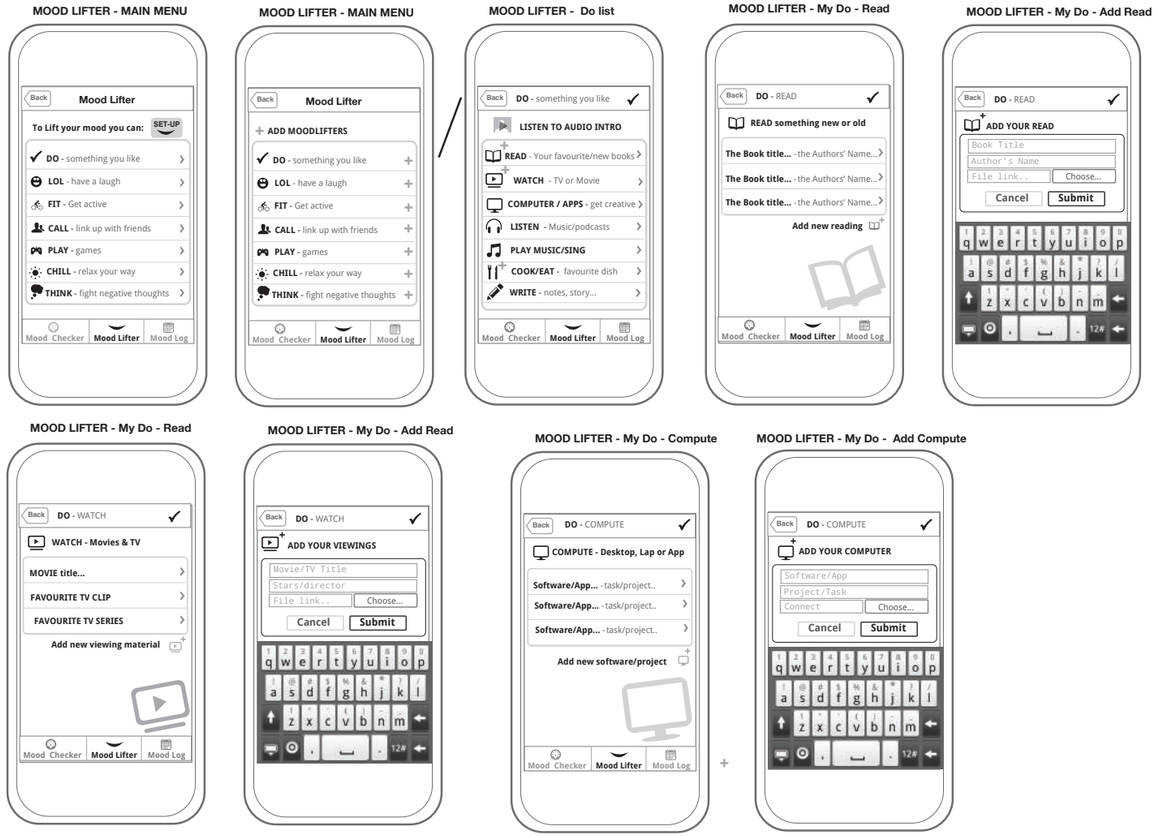
Wireframes / User Flow / Ideation

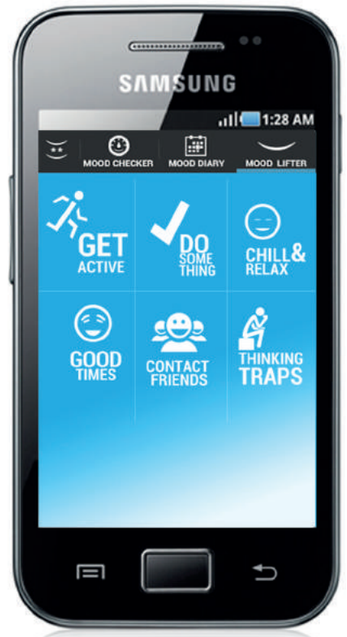


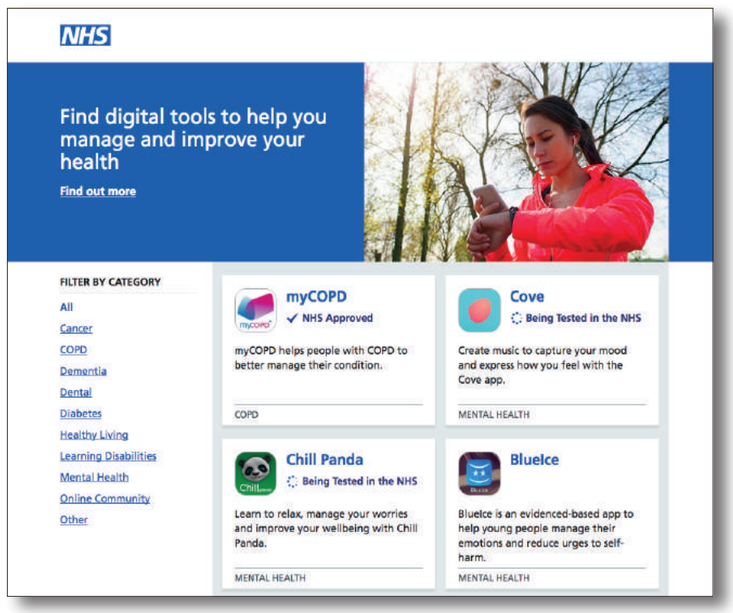
Mood Checker
When App loads - this section is mandatory. It will lead to

Fizzy Drinks (metaphor)

Popular with kids - it can relate to the ICE accronym with a memorable hook.
A prefered fizzy drink can add a sense of personalisation. Lemonade, Cherryade, orangeade, cola, etc. Possible animation of background and objects into new positions, can give the game-like feel that will be engaging.







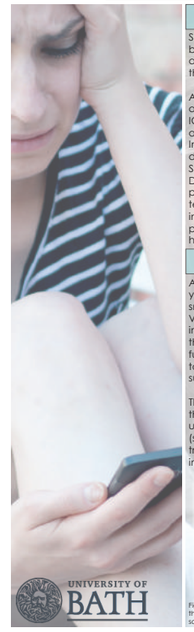
Blue ICE

App Design UI

Introducing Blue ICE: a self-harm prevention app

Involving hard to reach communities in shaping the design of new behaviour changing technology

Lisa Austin[1], Paul Stallard[2] and Samantha Warren[1]
Bath R&D, University of Bath[1] and Oxford Health NHS Foundation Trust[2]



Background

Smartphone technology has become an innovative way of assisting people to self-manage their mental health condition.

A free smartphone kiosk (stand alone) application called "Blue ICE" ('Blue' meaning depressed and 'ICE' being an acronym for In Case of Emergency) has been developed by Professor Paul Stallard and Bath Research & Development, to enable young people who self-harm to utilise techniques they have learnt in clinical therapy and help prevent further episodes of self-harm.

Methods

After consultation with a local young person's charity, the smartphone app "Blue ICE" Version 1 was designed to include features suggested by the user group, such as a diary function, feedback mechanism to chart progress and ways to summon help in an emergency.

This application lets users record their mood and feeling and utilise 'mood lifter' activities (see Figure 1 & 2). Phones and training were provided for individuals without smartphones.

Figures1 & 2. Screenshots of the app showing the initail screen and one of the mood checker screens.

Results

A group of young people who are being treated for self-harming and clinical depression in Oxford Mental Health Trust were consulted on the features of V1, with a view to creating V2 based on their feedback.

Overall the group thought the app was easy to use and understand, and they particularly liked that the app had a homepage that navigates to all of the major points easily.

They also liked that the app was bright and the colours were engaging, and that is was very well organised.

The members of the group did suggest changing the wording at the end from "Do you want to harm yourself?" to "Are you feeling that you have to harm yourself?".

V2 is currently being developed.

Conclusion

Smartphone applications for mental health issues can be developed with the input of users. Hard to reach communities can be involved in shaping the features and design of new behaviour changing technology.

Contact

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