Helen Stuart

Trustnet verdict

Overall, performing about the same as the peer group composite. Nevertheless, over a long track record, the manager has outperformed the peer group more often than not. Stockpicking has not really benefited results, which have not been particularly exposed to falling markets.

Manager profile

Helen Stuart is a Fund Manager (Index Funds). She joined LGIM in 1985 and, initially, worked as an Assistant Performance Analyst in Managed Funds. Subsequently, she spent six years in the administration area before joining the Index Funds team in 1994. Helen was originally responsible for maintaining the UK system and overseeing client portfolio weightings, before moving into the growing passive bond funds area in 1996. She became a Fund Manager in January 2001 focusing on the UK and corporate passive bond funds. Helen gained a first class B.Sc. honours degree in Mathematics from the Open University.

Overall market

Outperformed peer group composite

7 years

out of a possible 10

Rising market

Outperformed peer group composite

7 years

out of a possible 10

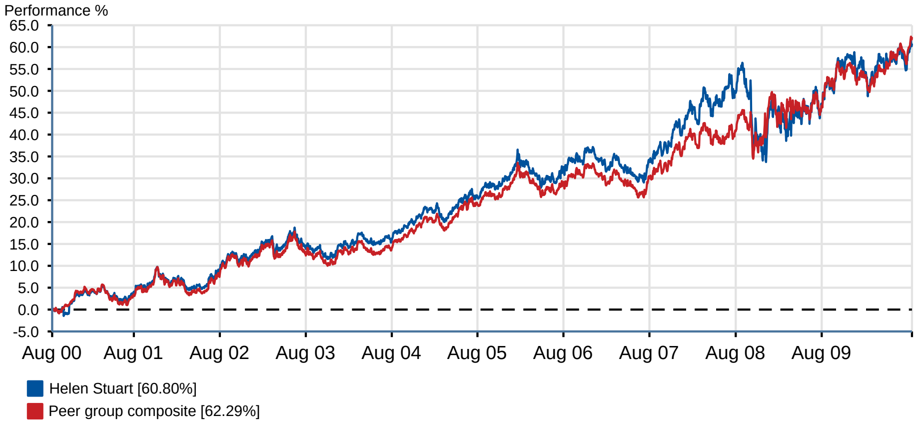
Falling market

Outperformed peer group composite

0 years

out of a possible 0

Past performance overview Helen Stuart vs. Peer group composite

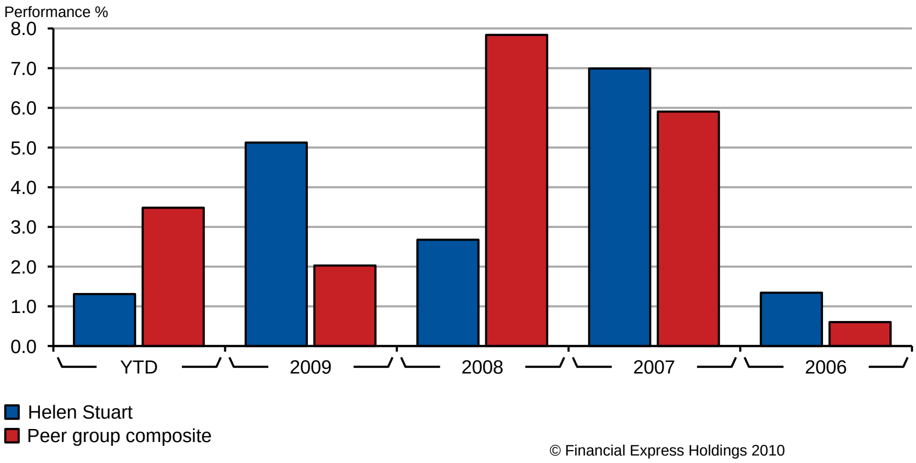


18/08/2000 - 20/08/2010 © Financial Express Holdings 2010

Cumulative performance (%)

	1m	3m	6m	1y	3y	5y
Helen Stuart	-1.5	+0.5	+2.0	+6.8	+17.6	+24.7
Peer group composite	-1.1	+1.9	+3.2	+7.7	+21.3	+26.9
Over / Under	-0.4	-1.4	-1.2	-0.9	-3.7	-2.2

Discrete calendar year performance



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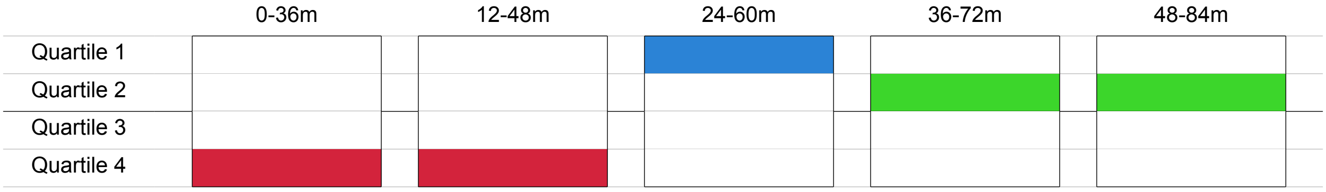
Discrete performance (%)

	0-12m	12-24m	24-36m	36-48m	48-60m
Helen Stuart	+6.8	-1.8	+12.1	+1.2	+5.1
Peer group composite	+7.7	+4.0	+8.3	+0.9	+4.0
Over / Under	-0.9	-5.8	+3.8	+0.3	+1.1

Performance figures are calculated on a bid price to bid price basis.

Rolling Alpha Quartile: Discrete three year periods

Rolling Alpha Quartile shows a managers alpha score in quartile terms, plotting his or her risk adjusted performance against all other managers in the UT & OEICs universe. The best managers are those who are consistently ranked in the first or second quartile.



Funds currently managed

Fund	Sole/Co-managed	Sector	Periods
Jessop (L&G) Index Linked Gilt PP	Sole	UT Pensions	since Feb 02 2004 to present
L&G All Stocks Index Linked Gilt Index	Sole	UT UK Index - Linked Gilts	since Feb 02 2004 to present

Funds managed previously

Fund	Periods
L&G All Stocks Gilt Index	since Jun 01 2000 to Jul 31 2006