

Phoenix SM Smoothed Growth

Fund objective

To invest in a balanced portfolio of equities, fixed interest and other assets selected for their growth potential.

Detailed fund information

Unit name Phoenix SM Smoothed Growth

FE fundinfo Crown Rating 

Sector Mixed Investment 40-85% Shares

Domicile United Kingdom

Fund currency GBX

Unit currency GBX

Launch date 07-Apr-2003

Fund size (as at 31-Jan-2007) £3.9m

Primary asset class Mixed Asset

Inc / Acc Accumulating

Price and charges

Bid price (as at 24-Feb-2026) GBX 310.80

Offer price (as at 24-Feb-2026) GBX 327.20

Initial charge n/a

Annual charge n/a

Codes

Citicode S767

ISIN GB0032809179

Management information

Address 1 Wythall Green Way, Birmingham

Website

<http://www.phoenixlifegroup.co.uk/>

Past performance overview fund vs. sector



Cumulative performance (%)

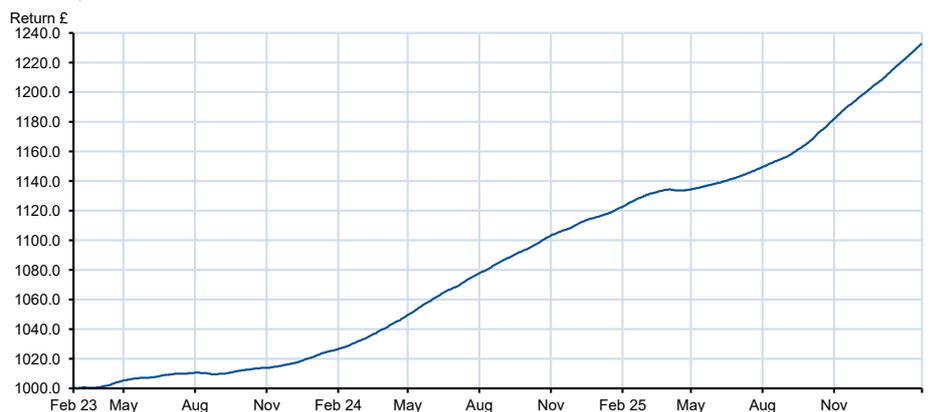
	YTD	3m	6m	1y	3ys	5ys
Phoenix SM Smoothed Growth	+2.1	+3.5	+6.8	+9.2	+23.3	+25.5
Mixed Investment 40-85% Shares	+3.5	+5.4	+8.4	+11.6	+26.6	+31.5

Discrete performance (%)

	YTD	2025	2024	2023	2022	2021
Phoenix SM Smoothed Growth	+2.1	+8.2	+9.3	+1.9	-5.3	+9.2
Mixed Investment 40-85% Shares	+3.5	+10.9	+6.9	+6.8	-7.8	+9.1

Growth of £1000 over 3 years

Total return performance of the fund rebased to 1000. Your actual return would be reduced by the cost of buying and selling the fund, and inflation.



■ Fund

All prices in Pence Sterling (GBX) unless otherwise specified. Price performance figures are calculated on a bid price to bid price basis with net income (dividends) reinvested. Performance figures are shown in Sterling.

Asset allocation

No Breakdown Data available

Regional breakdown

No Breakdown Data available

Sector breakdown

No Breakdown Data available

Top ten holdings

No holdings data available