

# Hilary Aldridge

## Manager profile

Hilary Aldridge has more than 18 years' experience investing in UK equities. She joined M&G in November 2019 from DWS Group where she was Director, UK Equities and a portfolio manager and analyst in the pan-European team. Prior to this, Hilary worked at Barclays Global Investments & Solutions as a portfolio manager with the multi-manager team, and with F&C Asset Management as a Director in the UK Equities team. Hilary has a background in environmental, social and governance (ESG) investing as a manager on the F&C Stewardship funds and as an adviser to Big Issue Invest, the UK's first social merchant bank. She graduated with an LLB in Law from the University of Birmingham.

## Overall market



Outperformed peer group composite

**5 years**

out of a possible 10

## Rising market



Outperformed peer group composite

**2 years**

out of a possible 6

## Past performance overview Hilary Aldridge vs. Peer group composite

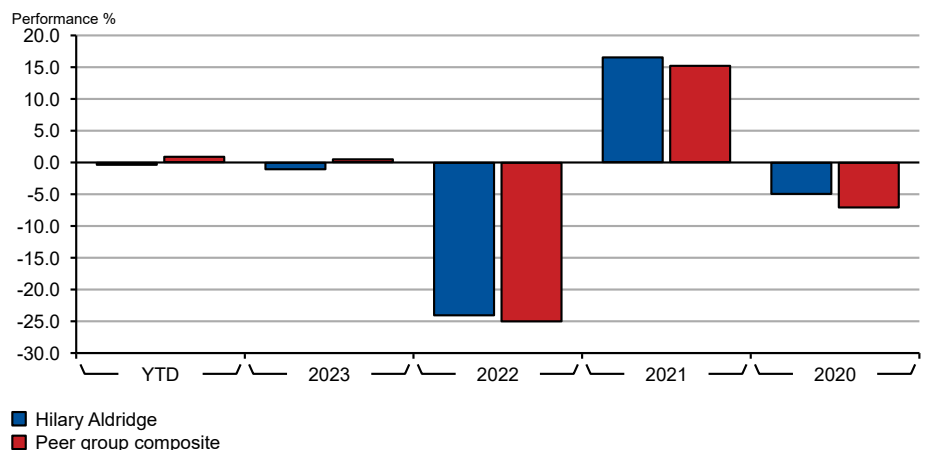


01-01-2000 - 31-03-2024 FE fundinfo 2024

## Cumulative performance (%)

	1m	3m	6m	1y	3y	5y
Hilary Aldridge	+4.5	+2.0	+10.9	+6.8	-15.8	-7.4
Peer group composite	+2.8	+1.4	+8.4	+5.0	-17.1	-8.9
Over / Under	+1.7	+0.6	+2.5	+1.8	+1.3	+1.5

## Discrete calendar year performance



Powered by data from FE fundinfo

## Discrete performance (%)

	0-12m	12-24m	24-36m	36-48m	48-60m
Hilary Aldridge	+6.8	-15.5	-6.7	+31.7	-16.9
Peer group composite	+5.0	-16.3	-5.7	+36.5	-19.5
Over / Under	+1.8	+0.8	-1.0	-4.8	+2.6

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

**Falling market**


Outperformed peer group composite

**3 years**

out of a possible 4

**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.

	53-89m	65-101m	77-113m	89-125m	101-137m
Quartile 1					
Quartile 2					
Quartile 3					
Quartile 4					

**Funds currently managed**

Fund	Sole/Co-managed	Sector	Periods
M&G Smaller Companies	Co-managed (deputy)	UT UK Smaller Companies	since Jul 01 2021 to present

**Funds managed previously**

Fund	Periods
BMO UK Ethical	since Oct 14 1996 to fund close
Barclays UK Alpha (Series 2)	since Oct 01 2013 to fund close
Barclays UK Core	since Oct 01 2013 to fund close
Barclays UK Equity Income (Series 2)	since Oct 01 2013 to fund close
Barclays UK Lower Cap	since Oct 01 2013 to fund close
Barclays UK Alpha	since Oct 01 2013 to Dec 31 2016
Barclays UK Equity Income	since Oct 01 2013 to Dec 31 2016
Barclays UK Opportunities	since Oct 01 2013 to Dec 31 2016
BMO UK Growth & Income	since Jun 01 2009 to fund close
BMO Special Situations	since Dec 01 2007 to fund close
M&G Smaller Companies	since Nov 02 2020 to Apr 30 2021