
MARKET EDGE

Get ready for lift off!

Aviva Investors have published their latest House View, available [here](#), with senior economist Stewart Robertson covering some of their main investment themes.

The key points are:

- The impending US rate rise has dampened our enthusiasm for equities and other risk assets
- After a recent surge in strength, the US dollar is expected to rally further
- A rapid rise in government bond yields in 'developed' markets looks unlikely
- While monetary policy will suppress volatility, there will be opportunities for 'relative value' trades from spikes in volatility.



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FUNDS FOCUS

The UK Property Market

Momentum to peak this year?

According to Richard Levis from Aviva Investors' Real Estate team, surging UK real estate returns are set to persist in 2015 with the strongest growth in the regions as London cools. Retail is also likely to be the only main segment to grow faster this year than last.

You can read the latest market commentary from Richard [here](#).



Aviva Irl (AIMS) Target Return Fund

The AIMS Target Return Fund has proven to be extremely popular with Irish Financial Brokers, with over €40m invested into the fund since its launch last October.

*Since launch, the fund has produced an impressive return of **6.9%**. (Source: Moneymate, performance since launch date 24 October 2014 to 2 March 2015 and is net of fees). Download the latest AIMS Target Return presentation [here](#).*

For full information on the AIMS Target Return Fund, please click [here](#) or speak to your Broker Consultant.



Webinar Playback

On 11 February, we held our latest AIMS Target Return Fund CPD Webinar with the fund managers. In case you missed it, you can playback the webinar [here](#). Keep an eye on your email and avivabroker.ie for news of our next online event.

(Please note unfortunately CPD points are not available for webinar playback).

Spectrum Bond special offer continues

Don't forget, you can still avail of the special offer on our single-premium investment product, Spectrum Bond.

You can offer your customers additional allocation on **Spectrum Bond** from Aviva. There are **two** great offers available:

- 104% (i.e. an extra 0.5%) gross allocation for premiums greater than €30,000
- 104.5% (i.e. an extra 1%) gross allocation for premiums greater than €100,000.

Please note the extra allocation is only available on a no override basis.

Spectrum Bond has a wide choice of funds to suit most risk appetites, including the Risk-Targeted Multi Asset Funds and the Aviva Irl Multi Strategy (AIMS) Target Return Fund.

For full details on Spectrum Bond, click [here](#) or speak to your Broker Consultant.



FUND AND MARKET HIGHLIGHTS

On the eve of quantitative easing...

- Even as the European Central Bank's quantitative easing (QE) programme is due to start next month, the Greek economy is once again in the limelight for debt restructuring. Focus will remain on the euro zone with the QE around the corner.

- The Japanese economy is yet not out of the woods with consumer confidence survey not showing much support for the recovery.

- In the midst of developed market woes, emerging market countries were once again in focus with expectations riding on both Indian and Chinese economies to recover smartly this year.

- According to data from EPFR Global, a fund flow aggregator, just like in January, the start to February was also about flows into bond funds and away from equity. However, emerging market equity funds did well, with Chinese and Indian equity funds continuing to garner fresh money throughout the month.

- But towards the middle of the month, flows into EPFR global-tracked equity funds picked up, and as optimism around Greece being able to extend its payment period came to stay, risk came back to the table.



[DOWNLOAD OUR MONTHLY FUND PERFORMANCE SCORECARD HERE](#)

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Warning: Past performance is not a reliable guide to future performance.

Warning: The value of your investment may go down as well as up.

Warning: If you invest in these funds you may lose some or all the money you invest.

Warning: A deferral period may apply to withdrawals and/or switches from certain funds. Please refer to your product documentation for further details.

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