



Investments • Pensions • Financial Planning

The background of the lower half of the page is a photograph of a vast, rolling landscape. In the foreground, there are golden-yellow fields, possibly wheat or corn. In the middle ground, there are dark, undulating hills. In the background, a range of mountains is visible under a clear blue sky. A semi-transparent dark blue rectangular box is overlaid on the center of the image, containing the title text in white.

Guide to: Investment Income Yields

Estimated investment income yields

A brief overview of projected income yields

In our “Guide to investing for income”, we outline the various sources of investment income. These are broadly categorised as interest from loans or deposits, a share in company profits, or rent from property.

As a supplement to that generic guide, this one-page summary gives an idea of the income that can be derived currently from the various investments discussed in the guide.

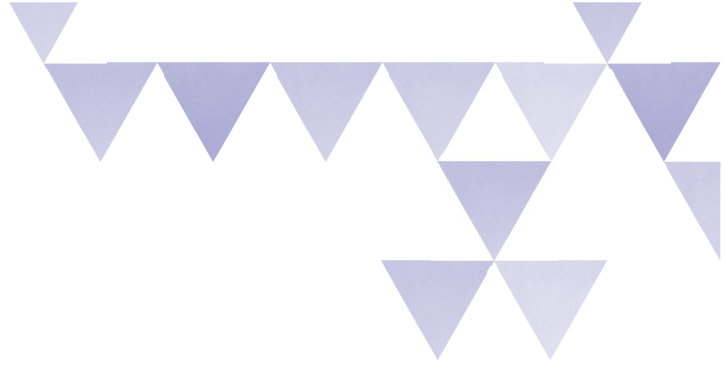
All yield data calculated by Atkins Bland Ltd. Source: FE Analytics

Sector	Estimated yield available for those seeking high income	Highest available from funds we recommend at January 2025
Asia excl Japan Income Fund	4.50%	7.00%
Emerging Market Equity Income Fund	4.00%	6.50%
European Income Fund	3.50%	4.00%
Global Clean Energy	7.00%	11.75%
Global Equity Income Fund	3.25%	3.25%
Global Resources Fund	3.75%	6.50%
Global Infrastructure Fund	3.75%	5.00%
UK Infrastructure Fund	5.50%	6.00%
Japanese Income Fund	2.50%	3.50%
North American Income Fund	3.25%	5.00%
Private Equity Investment Trust	4.25%	5.75%
Property Real Estate Investment Trust	5.50%	7.50%
UK Equity Income Fund	4.50%	4.75%
UK Equity Enhanced Income Fund	6.00%	6.50%
EM Bond Fund	5.75%	6.75%
Global HYB Fund	5.75%	6.00%
UK HYB Fund	6.25%	7.50%
Global Bond Fund	4.25%	4.25%
UK Gilt Fund	3.75%	N/A
5 Year Fixed	4.00%	N/A
2 Year Fixed	4.00%	N/A
Easy Access	4.00%	N/A

These figures are intended as a guide only. The actual starting level of income available from each sector depends on market values at the point of investment and the specific investment used. Income can also fall as well as rise, as will the capital values, other than with a deposit account.

The yields shown are before advice and portfolio administration costs so net income available for spending will be lower. Income from equity and property funds should rise to help combat inflation over the medium to long term, while income from other areas probably is unlikely to. This document should be read along with our Guide to Investing for Income, and not in isolation.

Important notes



Any opinions expressed on the merits or disadvantages of any options are intended as a general comment only and not as specific advice to the reader.

This document is intended as a supplement to full independent advice and not as a replacement for it and should be read in conjunction with any personalised recommendations provided by Atkins Bland Ltd and with any product brochures supplied.

The value of investments will fall as well as rise, as can any income produced or generated. An investor may, therefore, get back less than invested.

Inflation can reduce the real value of capital and the income it generates.

Past investment performance is not a reliable guide to the future.

Any reference to taxation, regulation or legislation is based on our current understanding and details should be checked before any reliance is placed upon its accuracy.

The impact of taxation and tax planning depends on individual circumstances and may be subject to change, which can be retrospective.

Errors and omission excepted.

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