

# Examples of AIM companies included in the Aim Portfolio IHT Plan



## James Halstead

[www.jameshalstead.com](http://www.jameshalstead.com)

James Halstead, formed in 1915, floated on AIM in March 2002 and is a long established manufacturer and distributor of a wide range of vinyl floor coverings and tiles sold worldwide under the Polyflor and Objectflor brands, with applications ranging from Industrial flooring to Healthcare and Education. For the 12 months to 30 June 2023 sales were £303.6 million with profit before tax of £52.1 million. The company has net cash reserves.



## AB Dynamics

[www.abdynamics.com](http://www.abdynamics.com)

AB Dynamics is a leading supplier of automotive test systems. Today, their clients include the top 25 global vehicle manufacturers, all seven Euro NCAP laboratories and numerous government test authorities. It was founded in 1982 and floated on AIM in 2013. For the 12 months to 31 August 2022 sales were £80.3 million with profit before tax of £12.4 million. The company has net cash reserves.



## Yougov

[www.yougov.co.uk](http://www.yougov.co.uk)

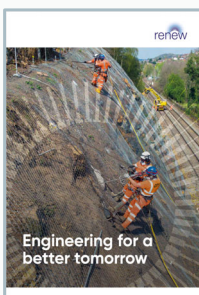
Yougov, listed on AIM in 2008, is a world leader in international research data and analytics. Their cutting edge data generated from a range of diverse panels provides essential real time information to some of the world's most recognisable brands to help co-ordinate marketing campaigns, as well as providing real time information on the political landscape. Sales for the year to 31 July 2023 were £258.3m with profit before tax of £44.7m. The company has net cash reserves.



## Advanced Medical Solutions

[www.admedsol.com](http://www.admedsol.com)

Advanced Medical Solutions is a leading company in the development and manufacture of products for the multibillion pound global wound-care market, supplying over 75 countries through over 100 distribution partners. It was founded in 1991 and floated on AIM in 2002. For the 12 months to 31 December 2022, sales were £108.6 million with profit before tax of £28.5 million. The company has net cash reserves.



## Renew

[www.renewholdings.com](http://www.renewholdings.com)

Renew is a leading UK engineering services business that operates on key critical infrastructure networks, including maintenance activities on rail, road and water networks and support for energy facilities. The company was formed in 1960 and listed on AIM in 2006. For the year to 30 September 2022 sales were £849m with profit before tax of £49.4m. The company has net cash reserves.



## Cerillion

[www.cerillion.com](http://www.cerillion.com)

Cerillion floated on AIM in March 2016 and is the leading supplier of carrier-grade, enterprise billing and CRM software, supporting fixed wire, mobile, broadband and TV communication providers. Cerillion's solutions are now used in c. 80 customer installations across c. 45 countries. For the 12 months to 30 September 2022 sales were £32.7 million with profit before tax of £10.9 million. The company has net cash reserves.

The above examples are for illustrative purposes only and may or may not be incorporated into the Aim Portfolio IHT Plan portfolios that are established in the future. This illustration should be read in conjunction with the Inheritance Tax Planner Brochure. References to taxation are based on our current understanding of the legislation but we do not represent that it is accurate or complete and it should not be relied upon as such. Tax laws are subject to change. Past performance is not a guide to future performance. The value of investments, and the income derived from them, may fall as well as rise and clients may not get back their initial investment. With respect to the AIM portfolio this investment should only be considered by investors who are prepared to take a higher level of risk. The data is correct as at November 2023.

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<b>Birmingham</b>	0121 232 0700	<b>Edinburgh</b>	0131 226 5000	<b>Leeds</b>	0113 245 4488	<b>Sheffield</b>	0114 275 5100
<b>Bournemouth</b>	01202 208100	<b>Exeter</b>	01392 204404	<b>Liverpool</b>	0151 227 2030		
<b>Bristol</b>	01172 444860	<b>Glasgow</b>	0141 333 9323	<b>London</b>	020 7597 1234		

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