

Ulster Local History Trust

Northern Ireland · Charity number 101555

Details

Known as	ULHT
Status	Received
Registered	2015-02-17
Register	View on the Charity Commission for Northern Ireland register

Contact

Address	Orr's Corner Labby Draperstown County Londonderry Bt45 7be BT45 7BE
Phone	+44(0)2879628098
Email	info@ulht.org.uk
Website	www.ulht.org.uk

Activities

Purposes: The Trust has been established to promote, without distinction of age, sex, race, political or religious persuasion, a high standard in the area of historical research and publications, to advance education and to provide opportunities to learn, discuss and share heritage and history.

What the charity does: The advancement of education, The advancement of the arts, culture, heritage or science

How the charity works: Cross-border/cross-community, Grant making, Heritage/historical

Who the charity helps: General public

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£0	£2,063	£0	0

Trustees

Name	Role	Appointed
Dr Kay Muhr		
Dr Liam G Campbell		
Dr Linde Lunney		
Dr Sean Beattie		
Mr Graham Mawhinney		
Mr Jack Johnston		
Mr John B Cunningham		
Mr Roderick Hegarty		
Ms Evelyn Cardwell		

Ulster Local History Trust

Northern Ireland - Charity number 101555

Accounts

Ulster Local History Trust Accounts

Year ended 31 March 2025

Patron: Lord O'Neill

**Trustees: Dr Seán Beattie, Dr Liam Campbell, Evelyn Cardwell (Chair), John Cunningham, John Dooher, Roddy Hegarty,
Jack Johnston, Dr Linde Lunney, Graham Mawhinney, Dr Kay Muhr.**

Charity No: NIC 101555

**Ulster Local History Trust
Trustees' Report
for the year ended 31 March 2025**

The trustees present their Accounts for the year ended 31 March 2025

Trustees

The trustees who served during the year were as follows:

Dr Sean Beattie	Ms Evelyn Cardwell
Mr John Cunningham	Mr Jack Johnston
Mr Roddy Hegarty	Dr Kay Muhr
Mr Graham Mawhinney	Dr Linde Lunney
Dr Liam Camobell (Chair)	

Registered Address

Orr's Corner
Labby
Draperstown
BT45 7BE

Independent Examiner

Mr Samuel K Atcheson
100 Lisky Road
Victoria Bridge
Strabane
County Tyrone
BT82 8QA

Bankers

Ulster Bank
11-16 Donegal Square East
Belfast BT1 5UB

AIB
The Diamond
Monaghan

Charity Registration Number

101555

Ulster Local History Trust
Financial statements for Year Ended 31 March 2025

1 Income and Expenditure Account

	Year ended 31 March 2025	Year ended 31 March 2024
Income		
Investment Income	0.00	0.00
Council Grant	0.00	0.00
Conference Subscriptions	0.00	0.00
Publication Sales	<u>0.00</u>	<u>0.00</u>
	0.00	0.00
Expenditure		
Travel Expenses	-133.00	-79.80
Conference Expenses		
Meeting Expenses	-31.18	-31.18
Bank Charges	-19.19	-18.90
Website		
Publication		
Insurance	-30.00	-25.00
Memberships/Subscriptions	-50.00	
Office & Admin Costs		-28.93
Administrator Fees	-1,500.00	-1,500.00
Investment Charges		
Other Miscellaneous		<u>- 100.00</u>
	<u>- 1,763.37</u>	<u>-1,704.88</u>
Net Income/(expenses)	-1,763.37	-1,704.88
Grants Issued	<u>-300.00</u>	<u>-2,000.00</u>
Net Surplus/(Deficit)	-2,063.37	-3,704.88

2 Statement of Assets

Ulster Bank Current Account	£10,290.52	£12,353.89
Investec Bond book cost at March (Note 1)	£150,642.00	£153,842.33
AIB € Account	€963.65	€1,220.18

Notes to the accounts

1. The value of the Investec bond represents the book cost of the assets as at 31 March. Other than fees (which are recognised in the Income and Expenditure account), any profits or dividends from bond investments are reinvested in the product. Gains or losses are reflected in the Bond revaluation reserve until they crystallise, and no income is recognised in the Income and Expenditure account.

Ulster Local History Trust

Northern Ireland - Charity number 101555

Accounts

Ulster Local History Trust Accounts

Year ended 31 March 2024

Patron: Lord O'Neill

**Trustees: Dr Seán Beattie, Dr Liam Campbell, Evelyn Cardwell (Chair), John Cunningham, John Dooher, Roddy Hegarty,
Jack Johnston, Dr Linde Lunney, Graham Mawhinney, Dr Kay Muhr.**

Charity No: NIC 101555

**Ulster Local History Trust
Trustees' Report
for the year ended 31 March 2024**

The trustees present their Accounts for the year ended 31 March 2024

Trustees

The trustees who served during the year were as follows:

Dr Sean Beattie	Ms Evelyn Cardwell
Mr John Cunningham	Mr John Dooher
Mr Roddy Hegarty	Mr Jack Johnston
Mr Graham Mawhinney	Dr Kay Muhr
Dr Liam Camobell (Chair)	Dr Linde Lunney

Registered Address

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Labby
Draperstown
BT45 7BE

Independent Examiner

Mr Samuel K Atcheson
100 Lisky Road
Victoria Bridge
Strabane
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Belfast BT1 5UB

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The Diamond
Monaghan

Charity Registration Number

101555

Ulster Local History Trust
Financial statements for Year Ended 31 March 2024

1 Income and Expenditure Account

	Year ended 31 March 2024	Year ended 31 March 2023
Income		
Investment Income	0.00	0.00
Council Grant	0.00	0.00
Conference Subscriptions	0.00	0.00
Publication Sales	<u>0.00</u>	<u>0.00</u>
	0.00	0.00
Expenditure		
Travel Expenses	-79.80	-99.97
Conference Expenses		
Meeting Expenses	-31.18	-15.59
Bank Charges	-18.90	-18.90
Website		
Publication		
Insurance	-25.00	
Memberships/Subscriptions	-50.00	
Office & Admin Costs		-28.93
Administrator Fees	-1,500.00	-1,500.00
Investment Charges		
Other Miscellaneous		<u>- 100.00</u>
	<u>- 1,704.88</u>	<u>-1,763.39</u>
Net Income/(expenses)	-1,704.88	-1,763.39
Grants Issued	<u>-2,000.00</u>	<u>-1,000.00</u>
Net Surplus/(Deficit)	-3,704.88	-2,763.39

2 Statement of Assets

Ulster Bank Current Account	£12,353.89	£15,866.97
Investec Bond book cost at March (Note 1)	£153,842.33	£146,629.00
AIB € Account	€1,220.18	€1,410,68

Notes to the accounts

1. The value of the Investec bond represents the book cost of the assets as at 31 March. Other than fees (which are recognised in the Income and Expenditure account), any profits or dividends from bond investments are reinvested in the product. Gains or losses are reflected in the Bond revaluation reserve until they crystallise, and no income is recognised in the Income and Expenditure account.

Ulster Local History Trust

Northern Ireland - Charity number 101555

Annual report

Ulster Local History Trust
Trustees' Report
Year ended 31 March 2024

Patron: Lord O'Neill

**Trustees: Dr Seán Beattie, Dr Liam Campbell, Evelyn Cardwell (Chair), John Cunningham, John Dooher, Roddy Hegarty,
Jack Johnston, Dr Linde Lunney, Graham Mawhinney, Dr Kay Muhr.**

Charity No: NIC 101555

**Ulster Local History Trust
Trustees' Report
for the year ended 31 March 2023**

The trustees present their Report for the year ended 31 March 2024

Trustees

The trustees who served during the year were as follows:

Dr Seán Beattie	Ms Evelyn Cardwell
Mr John Cunningham	Mr John Doohar
Mr Roddy Hegarty	Mr Jack Johnston
Mr Graham Mawhinney	Dr Kay Muhr
Dr Liam Campbell (Chair)	Dr Linde Lunney

**Registered
Address** Orr's Corner
Labby
Draperstown
BT45 7BE

**Independent
Examiner** Samuel Atcheson LM LCGI DPA(CIPFA) FCMi Fiol GCGI
100a Liskey Road
Strabane
Co Tyrone
BT82 8QA

Bankers

Ulster Bank
11-16 Donegall Square East
Belfast BT1 5UB

Allied Irish Bank
The Diamond
Monaghan
Ireland

**Charity
Registration
Number** 101555

Ulster Local History Trust

Trustees Report 1st April 2023 – 31st March 2024

Meetings

Four Trust meetings were held during the year in addition to the Annual General Meeting, with two meetings held in person and two meetings held virtually via Zoom technology.

Average attendance for the year was 67.5% with between six and eight trustees present at each meeting as detailed in the table below:

Trustee	May-23	Sep-23	Dec-23	Mar-24
Meeting	Virtual	Virtual	Investec	Mellon Centre
LC	Yes	Yes	Yes	Yes
SB	Yes	Yes	Yes	Ap
EC	Yes	Yes	Ap	Yes
JBC				Ap
JD	Yes	Yes	Ap	Yes
RH	Yes	Yes	Yes	Yes
JJ	Ap	Yes	Yes	Yes
LL	Yes	Ap	Yes	Ap
GM	Yes	Yes	Yes	Yes
KM	Yes	Yes	Ap	Ap

Financial statement April 2023-March 2024 (see financial report for full details)¹

There was no actual income this year as such, our investment gains are not regarded as income until they are crystallised and transferred out to our bank account. Total expenditure was **£3,705** (£3,189) which included grant pay outs of **£2,000** (£1,000).

At the end of the financial year the Ulster Bank account stood at **£12,354** (£16,003) and the AIB account at **1,220** (1,410) Euro. Our investment account with Investec Wealth and Management continued to perform satisfactorily given the prevailing circumstances and now has a book price of **£142,007** (£140,149)

Overall the value of the Trust's capital assets stands at **£154,361** (£156,016). Our membership of the Federation of Ulster Local Studies has also been renewed and Trust has continued to avail of the Federation's insurance scheme.

Charity Commission NI

Final Accounts, Independent Examiner's Report and Trustees' Report for the year ended 31st March 202 were uploaded to the Charity Commission in January 2023. No queries were raised by the

¹ Figures in brackets are the corresponding figures for the previous year

Commission. The Trust expressed its sincere thanks to our accountant, Roisin Shanks for acting as independent examiner in accordance with CCNI's requirements.

Grant Applications

The Trust was again able to offer grants to encourage and assist with the production of good quality work in the field of local history. Seven (Six) grant applications were received this year, of which six were successful, one was insufficiently developed to qualify. Grants will be paid out in due course when the projects are satisfactorily completed.

The seven applications for grant support approved during the year were:

- The Torrent – A publication celebrating 40 years of Donaghmore Historical Society
- Rosemary Doherty – The Autobiography of Fr Daniel Cummings Part Two
- Gerard Healy – Coolfore, West Farney and the National School System 1826-1968
- Jim McGeery – Production of illustrated maps of the Garron Plateau, Co Antrim for a publication about bogs
- Seamus Mac Anniadh – Publication of the 2024 edition of the Fermanagh Miscellany
- Support towards the publication of Spark Magazine
- Donal McAnnallan – Faction, Famine & Flight: The Powerscourt Estate, Benburb, 1835-50

Three grant payments were made this year to support the publications: The Torrent – A publication celebrating 40 years of Donaghmore Historical Society; Fermanagh Miscellany and Coolfore, West Farney and the National School System 1826-1968 all of which have now been published:

Publicity

It is encouraging to note that the number of grant applications has increased once again this year, which may perhaps indicate that the increased focus on publicity is paying off. However, the Trust is concerned that it is still receiving a number of applications which are in effect premature and lack the essential supporting documents in order to be considered. In such cases applicants were encouraged to re-submit when the project was closer to completion, and given advice where it was considered necessary.

The Trust also maintained its public profile through its website and Facebook pages.

Seminar - Digitisation

Discussions regarding a seminar/workshop on Digitisation commenced during the previous year are ongoing and it is hoped that an event on the topic will be held in the not to distant future.

Website

The website continues to get good usage highlighting the dependence by local historians on digital materials. Over 100 weblinks are provided to the most commonly used resources for local history in Ulster. Also the grants section highlights our funding regime and provides an online application process together with a listing of other grant aiding bodies.

Queries

The Trust responded to a number of queries this year as in previous years , some related to requests for local history publications, a few from film/media companies and students seeking assistance and advice and others were research queries

Patron: Lord O'Neill

**Trustees: Dr Seán Beattie, Dr Liam Campbell, Evelyn Cardwell (Chair), John Cunningham, John Dooher, Roddy Hegarty,
Jack Johnston, Dr Linde Lunney, Graham Mawhinney, Dr Kay Muhr.**

Charity No: NIC 101555

Ulster Local History Trust

Northern Ireland - Charity number 101555

Annual return

Independent Examiner's report to the charity trustees of Ulster Local History Trust

I report on the accounts of the Ulster Local History Trust for the year ended 31 March 2024, which are set out overleaf.

Respective responsibilities of charity trustees and examiner

As the charity's trustees you are responsible for the preparation of the accounts in accordance with the Charities Act (Northern Ireland) 2008.

It is my responsibility to:

- examine the accounts under section 65 of the Charities Act
- follow the procedures laid down in the general Directions given by the Commission under section 65(9)(b) of the Charities Act
- state whether particular matters have come to my attention.

Basis of independent examiner's report

I have examined your charity accounts as required under section 65 of the Charities Act and my examination was carried out in accordance with the general Directions given by the Charity Commission for Northern Ireland under section 65(9)(b) of the Charities Act.

My examination included a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also included consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as charity trustees concerning any such matters.

My role is to state whether any material matters have come to my attention giving me cause to believe:

1. That accounting records were not kept in accordance with section 63 of the Charities Act
2. That the accounts do not accord with those accounting records
3. That the accounts do not comply with the accounting requirements of the Charities Act
4. That there is further information needed for a proper understanding of the accounts to be reached.

Independent examiner's statement

I have completed my examination and have no concerns in respect of the matters (1) to (4) listed above and, in connection with following the Directions of the Charity Commission for Northern Ireland, I have found no matters that require drawing to your attention.



Samuel Atcheson LM LCGI DPA(CIPFA) FCMI FIoL GCGI
Member, CIPFA

Date: 29th January 2025

Greenacres (NI) Ltd, 100a Liskey Road, Strabane, BT82 8QA

Ulster Local History Trust

Northern Ireland - Charity number 101555

Accounts

Ulster Local History Trust
Financial statements for Year Ended
31 March 2023

Income and Expenditure Account

	Year Ended 31st March 2023	Previous Year 31st March 2022
Investment Income	£ -	£ -
Council Grant	£ -	£ -
Conference Subscriptions	£ -	£ -
Publication Sales	£ -	£ -
	£ -	£ -

Expenditure	Year Ended 31st March 2023		Previous Year 31st March 2022
	Sterling	Euro	
Travel Expenses	£ 99.97	€ 117.50	
Conference Expenses			
Meeting Expenses	£ 15.59		
Bank Charges	£ 18.90	€ 16.67	£ 30.00
Website		€ 83.95	£ 221.00
Publication	£ 1,000.00		£ 3,251.00
Insurance			
Promotional Material (reprint leaflets)		€ 215.65	
Membership			£ 25.00
Office & Admin Costs	£ 28.93		£ 74.00
Administrator Fees	£ 1,500.00		£ 1,500.00
Investment Charges	£ 1,294.00		£ 1,228.00
Other Miscellaneous*	£ 100.00	€ 50.00	
	£ 4,057.39	€ 483.77	£ 6,329.00

***Other Miscellaneous**

Donation MND £100.00

Ad in SPARK 50 euro

Bank Balances as at 31 March 2023

Balance in Ulster Bank	£	15,895.90		
Investec Valuation	£	140,149.10	Total	£ 157,407.18
Balance in AIB	€	1,362.18		
Ulster Local History Trust - Bank Balances March 2022				
Balance in Ulster Bank	£	33,629.16		
Investec Valuation	£	127,197.00	Total	£ 162,670.41
Balance in AIB	€	1,844.25		

Ulster Local History Trust

Northern Ireland - Charity number 101555

Annual report

Ulster Local History Trust
Trustees' Report
Year ended 31 March 2023

Patron: Lord O'Neill

**Trustees: Dr Seán Beattie, Dr Liam Campbell, Evelyn Cardwell (Chair), John Cunningham, John Dooher, Roddy Hegarty,
Jack Johnston, Dr Linde Lunney, Graham Mawhinney, Dr Kay Muhr.**

Charity No: NIC 101555

**Ulster Local History Trust
Trustees' Report
for the year ended 31 March 2023**

The trustees present their Report for the year ended 31 March 2023

Trustees

The trustees who served during the year were as follows:

Dr Seán Beattie	Ms Evelyn Cardwell (Chair to 10 Jan 2023)
Mr John Cunningham	Mr John Doohar
Mr Roddy Hegarty	Mr Jack Johnston
Mr Graham Mawhinney	Dr Kay Muhr
Dr Liam Campbell (Chair 10 Jan 2023 -)	Dr Linde Lunney

**Registered
Address** Orr's Corner
Labby
Draperstown
BT45 7BE

**Independent
Examiner** Róisín Shanks
Fellow, Chartered Accounts Ireland
7 Foxleigh Wood,
Lurgan,
Co Armagh
BT 67 9GW

Bankers

Ulster Bank
11-16 Donegall Square East
Belfast BT1 5UB

Allied Irish Bank
The Diamond
Monaghan
Ireland

**Charity
Registration
Number** 101555

Structure, Governance and Management

The Ulster Local History Trust is a registered charity and is governed by the terms of its constitution. [Three Trust meetings](#) were held during the year in addition to the Annual General Meeting. [Two were held via Zoom and one was held in person for the first time in almost three years.](#)

Objectives and Activities

Ulster Local History Trust was established in 1980 by the Federation for Ulster Local Studies with the objective of promoting the profile of local history in the nine countries of Ulster.

The Trust uses various methods to achieve this objective, such as

- Awarding small grants for high quality local historical projects, carried out by voluntary groups and individuals (budget permitting). Particular attention is paid to innovation in demonstrating the value of local history to our shared communities.
- Providing advice to authors on good practice and general signposting to those who seek assistance in the field of local history.
- Keeping a watching brief on opportunities for, and risks to, the raising of standards of excellence in local historical studies especially on province-wide issues and responding accordingly where it is felt to be appropriate.
- organising regular conferences in support of local history.

Achievements, Performance and Public Benefit

The Trust was again able to offer grants to encourage and assist with the production of good quality work in the field of local history. [Six grant applications were received this year, of which two were successful, one did not meet the criteria and three were insufficiently developed to qualify.](#) Grants will be paid out in due course when the projects are satisfactorily completed.

[One grant payment was made this year to support the book “The Londonderry Militia \(1793-1816” \(J A Bodkin\) which has now been published:](#)

[It is encouraging to note that the number of grant applications has increased this year, which may perhaps indicate that the increased focus on publicity is paying off. However, the Trust is concerned that it is now receiving a number of applications which are in effect premature and lack the essential supporting documents in order to be considered. In such cases applicants were encouraged to re-submit when the project was closer to completion, and given advice where it was considered necessary.](#)

Queries

[The Trust provides a useful signposting service for a variety of queries, in addition to dealing directly with enquiries which are within the capabilities of the individual Trustees. In total the Trust responded to eleven queries in the year April 2022- March 2023. These ranged from media bodies seeking local contacts for television programmes, family history enquiries and requests for information on specific historical topics.](#)

Financial review

The investment account with Investec Wealth and Management has continued to perform satisfactorily. In addition to keeping our investments under continuous review at all our Trust meetings, we also met with our Investec Manager in May 2022 for an in-depth discussion and review of its performance.

Ulster Local History Trust

Northern Ireland - Charity number 101555

Annual return

Ulster Local History Trust
Accounts
Year ended 31 March 2022

Patron: Lord O'Neill

**Trustees: Dr Seán Beattie, Dr Liam Campbell, Evelyn Cardwell (Chair), John Cunningham, John Dooher, Roddy Hegarty,
Jack Johnston, Dr Linde Lunney, Graham Mawhinney, Dr Kay Muhr.**

Charity No: NIC 101555

**Ulster Local History Trust
Trustees' Report
for the year ended 31 March 2022**

The trustees present their Accounts for the year ended 31 March 2022

Trustees

The trustees who served during the year were as follows:

Dr Seán Beattie	Ms Evelyn Cardwell - Chair
Mr John Cunningham	Mr John Doohar
Mr Roddy Hegarty	Mr Jack Johnston
Mr Graham Mawhinney	Dr Kay Muhr
Dr Liam Campbell	Dr Linde Lunney

Registered Address Orr's Corner
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BT45 7BE

Independent Examiner Róisín Shanks
Fellow, Chartered Accounts Ireland
7 Foxleigh Wood,
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11-16 Donegall Square East
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Charity Registration Number 101555

Independent Examiner's report to the charity trustees of Ulster Local History Trust

I report on the accounts of the Ulster Local History Trust for the year ended 31 March 2022, which are set out overleaf.

Respective responsibilities of charity trustees and examiner

As the charity's trustees you are responsible for the preparation of the accounts in accordance with the Charities Act (Northern Ireland) 2008.

It is my responsibility to:

- examine the accounts under section 65 of the Charities Act
- follow the procedures laid down in the general Directions given by the Commission under section 65(9)(b) of the Charities Act
- state whether particular matters have come to my attention.

Basis of independent examiner's report

I have examined your charity accounts as required under section 65 of the Charities Act and my examination was carried out in accordance with the general Directions given by the Charity Commission for Northern Ireland under section 65(9)(b) of the Charities Act.

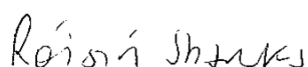
My examination included a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also included consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as charity trustees concerning any such matters.

My role is to state whether any material matters have come to my attention giving me cause to believe:

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2. That the accounts do not accord with those accounting records
3. That the accounts do not comply with the accounting requirements of the Charities Act
4. That there is further information needed for a proper understanding of the accounts to be reached.

Independent examiner's statement

I have completed my examination and have no concerns in respect of the matters (1) to (4) listed above and, in connection with following the Directions of the Charity Commission for Northern Ireland, I have found no matters that require drawing to your attention.



Roisin Shanks

Date: 16 November 2022

Fellow, Chartered Accountants Ireland

7 Foxleigh Wood, Lurgan, Co Armagh BT 67 9GW

Ulster Local History Trust

Financial statements for Year Ended 31 March 2022

1. Income and Expenditure Account

	Year ended 31 Mar 22	Year ended 31 Mar 21
<u>Income</u>	£	£
Investment income	-	-
Council grant	-	-
Conference subscriptions	-	-
Publications sales	-	-
Total income	-	-
<u>Expenses</u>		
Travel expenses	-	-
Conference expenses	-	-
Meeting expenses	-	-
Bank charges	-30	-21
Website	-221	-102
Publication	-3,251	-1,245
Insurance	-	-6
Memberships/subscription	-25	-25
Office & admin costs	-74	-55
Administrator fees	-1,500	-1,500
Investment charges	-1,228	-
Other miscellaneous	-	-
	-6,328	-2,953
Net income/(expenses)	-6,328	-2,953
Grants Issued	-	-
Net Surplus/Deficit	-6,328	-2,953

2. Statement of Assets and Liabilities

	31 Mar 22	31 Mar 21
		£
Ulster Bank Current Account	33,557	37,648
Investec Bond - book cost at March (note 1)	130,655	119,755
AIB € account	1,559	2,564
Total assets	165,770	159,967
Reserves		
Brought forward	159,967	155,180
Bond revaluation reserve	12,128	7,851
Profit/(loss) for the year	-6,328	-2,953
Exchange rate reserve	4	-111
Total reserves	165,770	159,967

Notes to the accounts:

1. The value of the Investec bond represents the book cost of the assets as at 31 March. Other than fees (which are recognised in the Income and Expenditure account), any profits or dividends from bond investments are reinvested in the product. Gains or losses are reflected in the Bond revaluation reserve until they crystallise, and no income is recognised in the Income and Expenditure account.