

The art and science of investment

Passive management

Core and enhanced portfolios

Your financial adviser has recommended passive management as being the most suitable investment approach for you.

Passive management: core portfolios

These portfolios are most suited to investors who are seeking to achieve market-like returns. This is achieved via long-term strategic asset allocation.

Our portfolios are risk-graded, this means we can cater for cautious to adventurous clients, ensuring that there is a portfolio best suited to your risk tolerance.

Portfolios are constructed using passively managed funds where available and these are designed to closely track the market.

We select the most appropriate index for each asset class, where available, taking into account both cost and the ability of the investment to replicate the market.

Passive management: enhanced portfolios

Our core passive portfolios form the foundation of our enhanced range. The enhancement is expressed through the addition of sectors or asset classes, to match our current tactical asset allocation. These portfolios are designed to deliver an enhanced market-like return.

Our research process

Our tried and tested investment process has been in place for over a decade. Our investment team use a combination of quantitative and qualitative methods to select the most suitable investments.

We invest in a variety of instruments and may also look outside of our traditional universe if the need dictates. We invest in funds that are priced and traded on a daily basis but may also

At a glance

- Suitable for investors seeking market-like returns
- Portfolios selected according to your attitude to risk
- Market-leading, regular communications so you can monitor the value of your investment
- One of the most competitive fee structures in the market

select vehicles that trade less frequently if there is a strong investment case.

Portfolio construction

We use both strategic and tactical asset allocation when constructing our portfolios. Strategic asset allocation is where we set target weightings for various asset classes, whereas tactical asset allocation seeks to exploit short-term opportunities within these asset classes. When the asset allocation is agreed for each risk-graded portfolio, it is ratified by our Investment Governance Committee.

In safe hands

We have an independently chaired Investment Governance Committee who ensure that our investment guidelines are strictly adhered to.

The Group has an independent audit and risk committee and industry leading Non-Executive Directors on its boards.

The passive review process



Exceptional client service

We enable you to monitor the value of your investments by providing an annual valuation for passive portfolios and a bi-annual valuation for enhanced passive portfolios.

In addition, we provide an Annual Review for core portfolios and a Six-Monthly Review for enhanced passive portfolios; these market-leading reports detail any changes we make to your portfolios and explain the reasons behind those changes. The reports also explain why the value of your investment has gone up or down, and our view on the markets.

We also ensure that you are kept up-to-date, with weekly bulletins providing market and economic updates published by our investment management team.

Most importantly, we believe in delivering value to our clients which means that our fees are amongst the most competitive in the market, and will be clearly explained to you by your financial adviser.

About us

Beaufort Investment Management is a discretionary fund management firm, with close to £1bn under management invested in over 40 model portfolios that are traded in the UK and globally, on behalf of private and corporate clients as well as trusts and charities.

First established in 2004, Beaufort's range of actively managed and risk-graded portfolios are

offered to investors via independent financial advisers who wish to enhance their clients' returns and preserve their wealth. They want the best possible outcome for their clients and trust in the accountable, professional, knowledgeable experts in our team at Beaufort Investment Management, a team which has over 100 years' collective experience bolstered by fresh, analytical methods.



For more information, please contact your financial adviser.
For more information on Beaufort Investment Management, please visit beaufortinvestment.co.uk

Beaufort Investment is a trading name of Beaufort Investment Management Limited.
Beaufort Investment Management Limited is authorised and regulated by the Financial Conduct Authority.

