Multi-Asset Blend Growth Fund

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INVESTMENT

Blended Management

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

Our range of actively managed multi-asset Funds are called 'the Multi-Asset Blend (MAB) Funds.'

MAB Growth

This Fund has a neutral weighting to equities of 80%. This weighting can range between 70% and 90%. Exposure is to a wide range of equity markets in order to obtain diversification. It is suitable for investors who are prepared to take some investment risk to improve long-term returns, where these are more important than capital protection.

Our Funds are risk-graded, which means that we can cater for Balanced or Growth clients, ensuring that there is a Fund best suited to your risk tolerance.

Funds are constructed using a combination of actively and passively managed funds from various investment management companies.

The investment team can pick active fund managers with the objective of outperforming the market. This requires a thorough understanding of the investment philosophy, the process and the business. We dedicate significant resources to ensure that we continue to identify the best fund managers in the market.

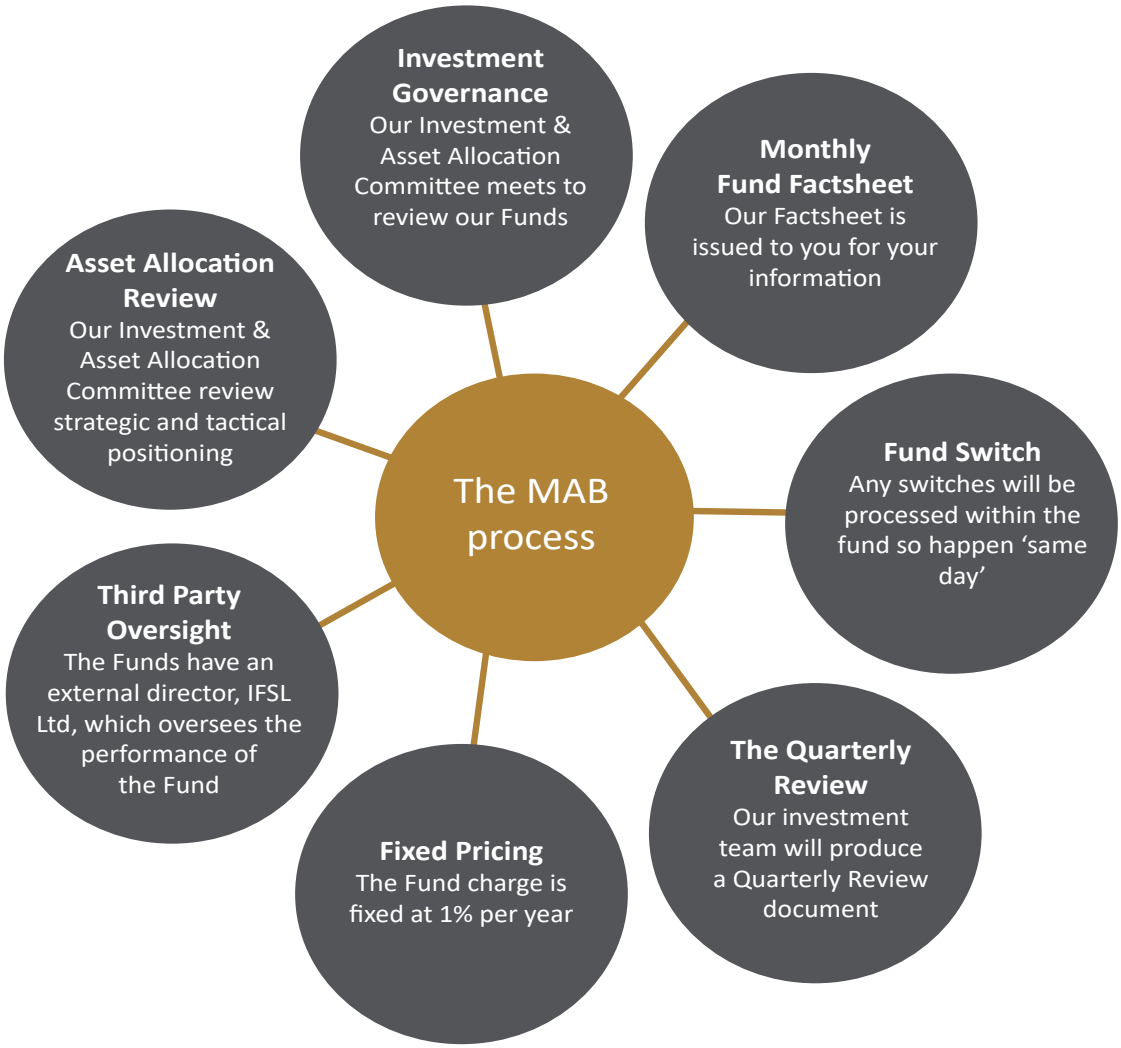
We 'blend' active funds with passive funds which are used to closely track the market. We select the most appropriate index for each asset class, where available, taking into account both cost and the ability of the investment to replicate the market.

The underlying managers of these funds have a range of styles. They invest in companies of all sizes, across a variety of asset classes and geographies hence the name "multi-asset".

At a glance

- Suitable for investors seeking to outperform the market over the long-term
- Funds selected according to your attitude to risk
- Returns are achieved via long-term strategies as well as short-term opportunities
- Where there are opportunities to outperform, funds are actively managed by fund managers with a range of styles
- Where the opportunity for outperformance is less clear, funds are passively managed to offer low cost, index-tracking performance
- Rigorous and regular screening, plus daily monitoring
- Market-leading, regular communications so you can monitor the value of your investment.
- One of the most competitive fee structures in the market

The MAB process



Our research process

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

We invest in a variety of investments 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 select those that trade less frequently if there is a strong investment case.

When the asset allocation is agreed for each Fund, it is ratified by our Investment & Asset Allocation Committee. This monthly Committee receives input from an independent Non-Executive Director and the Compliance team to ensure there is robust governance and oversight of the research process.

Portfolio construction

We use both strategic and tactical asset allocation to construct 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.

In safe hands

We have an Investment & Asset Allocation Committee which ensures that our investment guidelines are strictly adhered to. The Group has an independent Compliance Committee and industry leading Non-Executive Directors on its boards.

Exceptional client service

As an investor in our MAB Funds you will receive monthly factsheets, showing full look through of the underlying investments, enabling you to monitor your investment. In addition, we provide a Quarterly Review; this market-leading report details any changes we make to the Funds and explains the reasons behind those changes. The report also explains why the value of your investment has gone up or down, and our view on the markets.

We can 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 is a discretionary fund management firm, with close to £1bn under management invested in over 40 model portfolios and two Collective Investment Funds that are traded on behalf of private and corporate clients as well as trusts and charities.

First established in 2004, Beaufort's range of Funds and 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, a team which has over 100 years' collective experience bolstered by analytical methods.

Important Notes

All the information contained in the communication is believed to be reliable but may be inaccurate or incomplete. Any opinions stated are honestly held but not guaranteed and should not be relied upon. This is not a buy, sell or hold recommendation for any particular investment. The value of this investment is not guaranteed and on encashment you may not get back the full amount invested.

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