Managed Portfolio Service

Quarterly Investment Review Q3 2026



Radcliffe & Co

in partnership with

QUILTER CHEVIOT

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Market Commentary

Quarter ended 30 September 2026

Despite a steady stream of eye-catching negative headlines, global stock markets proved impressively resilient over the third quarter. Strong corporate earnings, a robust global economy and continued momentum in the artificial intelligence (AI) investment cycle underpinned sentiment, offsetting headwinds from the ongoing conflict in the Middle East, rising oil prices and higher bond yields. Global equities returned around 1.6% over the quarter (returns total and in sterling, unless otherwise stated), led by the Japanese, UK and US markets, taking the year-to-date (YTD) return for the MSCI All Country World Index to 15.0%. In contrast, European and emerging markets posted modest declines, with the latter pausing for breath after a particularly strong first half of the year.

Conditions proved more challenging for bonds, with stubborn inflation, tighter central bank policy and growing corporate debt issuance among the factors driving yields higher. UK government bonds ('gilts') returned -2.8%, although the sell-off was far from confined to a market that has attracted considerable attention in recent years. Sovereign debt losses were also seen across the eurozone, US and Japan, with their respective central banks each raising interest rates during the quarter. Higher yields also weighed on commercial property returns, while hedge fund strategies generated mixed performance over the period.

Although the macroeconomic backdrop has become more challenging for stocks, corporate performance has remained impressive. In the second quarter, large-cap US companies delivered their fastest earnings growth in five years, at 52%: more than double the 23% expected three months earlier. Companies in the UK and Europe also exceeded earnings forecasts. This strength has helped support equity markets. While US equities have led the way this year, with the MSCI North America returning 14.1%, the MSCI UK and MSCI Europe ex UK have also delivered solid returns of 9.6% and 7.6%, respectively.

It is not only corporate performance that has exceeded expectations; economic growth has also proved surprisingly resilient. The UK was the fastest-growing G7 economy in the first half of 2026, with GDP expanding by approximately 1.1%. However, similarly strong starts in 2024 and 2025 gave way to slower growth later in the year as Budget uncertainty weighed on activity. Moreover, the fact that growth of just 1.1% was enough to lead the G7 highlights the subdued performance of the UK's peers. Globally, economic growth has also exceeded forecasts, although this largely reflects a lower bar amid expectations of substantial headwinds.

Market Commentary

Quarter ended 30 September 2026

Outlook

Despite the adverse headlines that have dominated this year, 2026 is shaping up to be another positive period for equities. Given the disconnect between the prevailing pessimism surrounding a range of economic and geopolitical concerns and the continued strength of equity markets, it is entirely understandable that clients may question whether stocks have been driven higher by complacency or misplaced euphoria. We would argue neither is the case. Instead, returns have been underpinned primarily by robust fundamentals rather than expanding valuations. The global economy and US consumer have demonstrated remarkable resilience, while corporate earnings have continued to exceed expectations. Businesses, particularly in the US, are performing better than anticipated and, with earnings growth outpacing market gains, valuations (the price investors pay for future cash flows) have in fact become more attractive in recent months.

That is not to suggest the risks have disappeared. Indeed, with a challenging geopolitical backdrop and continued upward pressure on bond yields, there are certainly reasons for caution. However, there are also grounds for optimism, with attractive investment ideas available across a broad range of regions and, increasingly, sectors.

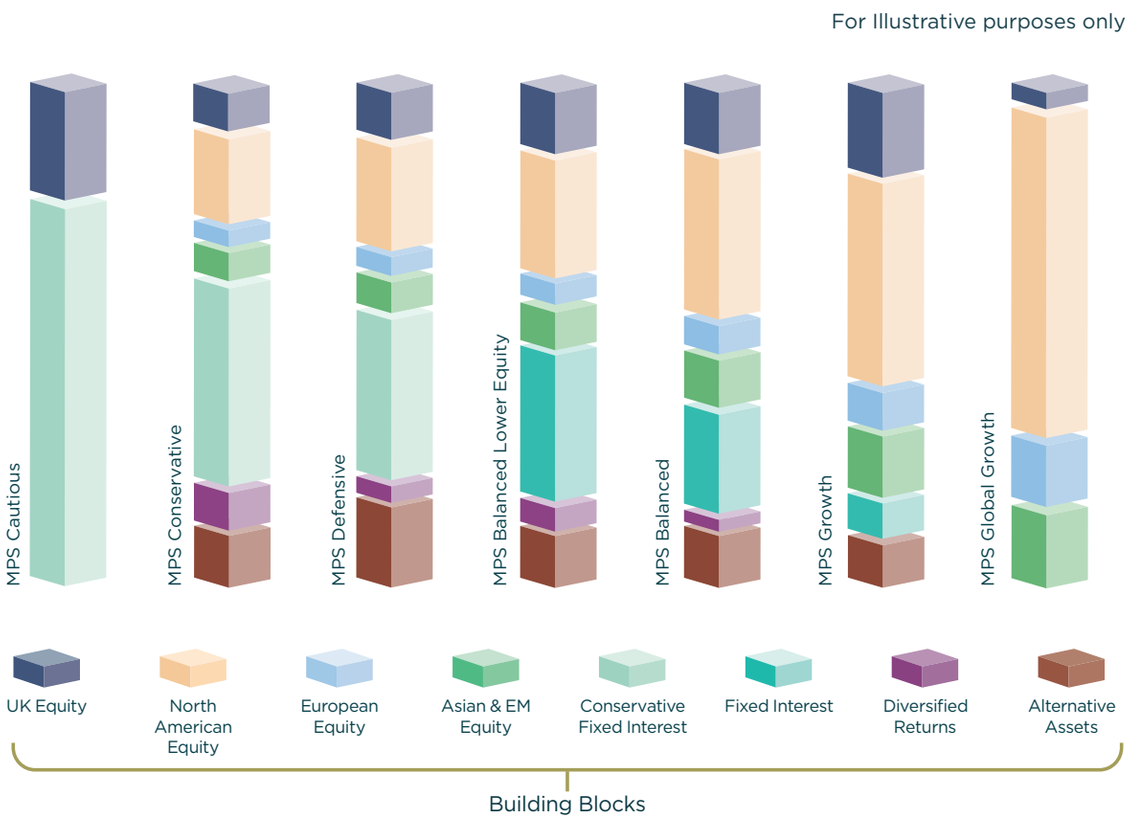
It is for these reasons that we remain constructive in our outlook as we enter the final quarter, albeit deliberate in our positioning. Equity allocations remain diversified and selective, reflecting our desire to capture opportunities where they exist while remaining mindful of pockets of exuberance. Technology remains an important, but not dominant exposure and, within the sector, selectivity across the AI value chain remains key. Holdings span ‘hyperscalers’ and cloud service providers, chip designers, equipment manufacturers and foundries, memory and data-storage producers, as well as data-centre real estate.

Across the strategies’ fixed-interest allocations, we continue to favour high-quality holdings that offer attractive income characteristics, alongside the potential to provide portfolio protection should the economic outlook deteriorate. Investor sentiment towards bonds remains notably subdued, meaning that even a modest improvement in inflation trends or expectations for fiscal and monetary policy could provide a meaningful tailwind for the asset class.

Finally, we remain convinced of the benefits of incorporating exposures with return profiles that are less closely correlated to traditional asset classes. In an environment where market leadership can shift quickly and macroeconomic uncertainty remains elevated, hedge fund and absolute return strategies continue to play an important role in asset allocation, providing an additional layer of diversification and helping to navigate a broader range of market conditions.

MPS Strategy Overview

How our Building Blocks form our MPS Strategies



The MPS strategies are constructed using the 'Building Blocks', a range of funds that Quilter Cheviot has established to build the investment exposures deemed optimal for each investment strategy. The Building Blocks are designed to provide specific geographic or asset class exposures, and are constructed using a combination of direct equities, bonds and / or external fund holdings.

From the 350+ global equities, 150+ fixed interest securities and 320+ funds that Quilter Cheviot's research teams actively research and monitor, the MPS team carefully select those which form the eight individual Building Blocks. Combined, these exposures provide clients with a best-in-class investment management solution that is both nimble in nature and active in its approach, all at a market-leading cost.

Quarterly Performance Overview & Attribution

As at 30 September 2026

Six of the seven MPS strategies delivered positive returns over the quarter, with only MPS Cautious recording a modest decline. Higher-risk strategies produced the strongest results, supported by rising equity markets and strong stock selection, while returns were more muted in lower-risk strategies given their greater exposure to fixed income assets. US equities were the standout contributor, with the North American Equity fund returning more than 5% and comfortably outperforming the broader market. UK equities also contributed positively, rising just under 1.9%. European equities, however, declined as sentiment towards the region softened later in the quarter, though positive security selection helped limit the impact on returns.

At the sector level, while **Information Technology** ('tech') continued to dominate headlines, returns were supported by a wide range of exposures, once again highlighting the benefits of maintaining a diversified portfolio. **US Health Care** was the strongest-performing allocation, led by a positive earnings update from **Thermo Fisher Scientific**, the manufacturer and distributor of life sciences tools and diagnostics. Energy holdings including **Shell**, **Chevron** and **BP** also contributed positively, benefiting from higher oil prices amid ongoing geopolitical tensions. Elsewhere, **UK Materials** and **European Industrials** names further supported performance. In contrast, rising bond yields weighed on the rate-sensitive **Utilities** sector.

Within the tech sector, leadership broadened beyond semiconductors following their stellar second-quarter performance, with software and services names taking the lead. The strategies' exposure to **Microsoft** and **Palo Alto Networks** performed strongly, while across Communication Services **Meta** also benefited from a positive response to the launch of Muse, its new agentic AI assistant, which reinforced investor confidence in the company's AI strategy and the commercial potential of its growing AI product suite. Among the strategies' semiconductor holdings, **NVIDIA**, the US allocation's largest holding, performed well to recover from a softer period of relative performance in the preceding quarter.

The strategies' fixed-interest holdings faced a testing environment, with persistent inflation, tighter monetary policy and rising bond yields resulting in declines. However, losses remained relatively contained, with higher starting yields helping to cushion the impact of falling bond prices. We continue to view bonds as a valuable source of portfolio diversification and an increasingly attractive source of income.

Lastly, the strategies' hedge fund and absolute return exposure made a positive contribution, taking year-to-date returns for the **MI Quilter Cheviot Diversified Returns** fund to more than 5%. This allocation has provided valuable support during a year in which fixed income assets have continued to face headwinds.

Contributors

- **North American equities led gains; with Information Technology, particularly software, and US Health Care performing strongly**
- **Energy stocks throughout the UK, Europe and US benefited from higher oil prices**
- **UK Materials and European Industrials also supported performance**

Detractors

- **Fixed income struggled amid persistent inflation and rising bond yields**
- **This also weighed on the rate-sensitive Utilities sector**
- **European equities fell, with Energy and Financials providing notable exceptions**

Performance to 30 September 2026

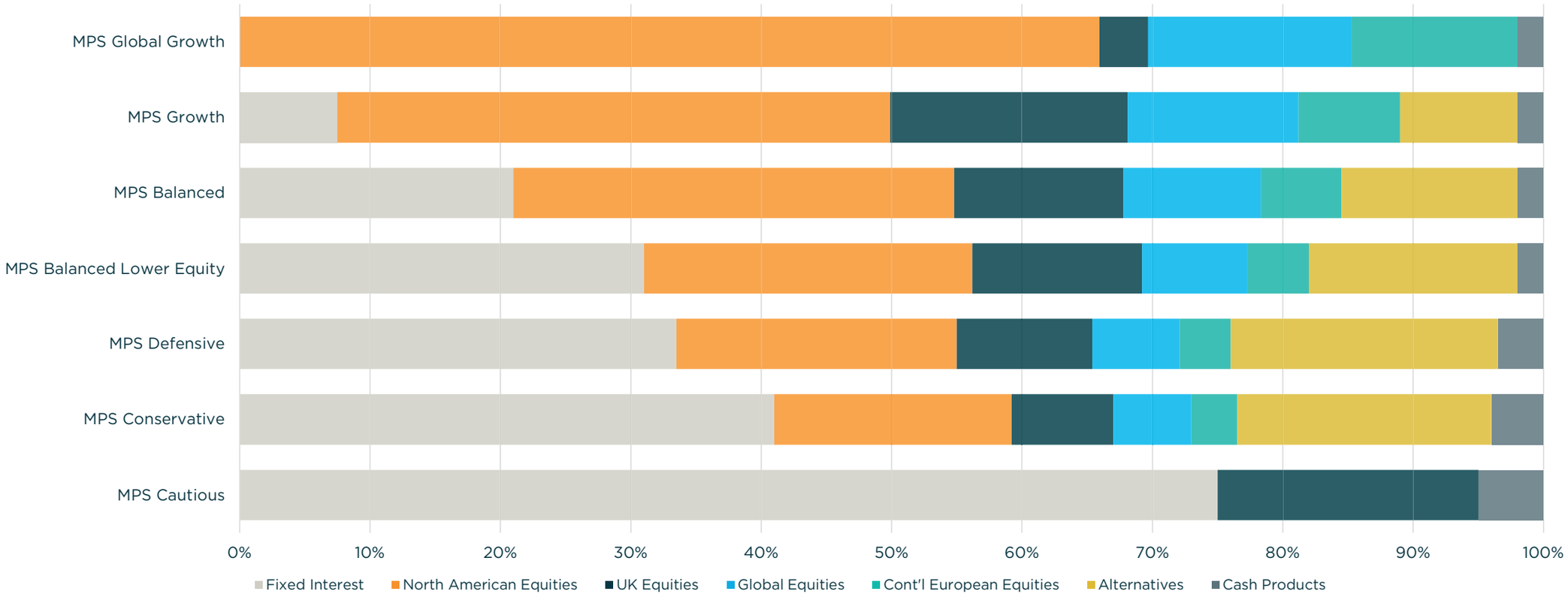
Strategy / IA Sector	3M	1Y	3Y	5Y
MPS Global Growth	**3.16%**	**18.55%**	**57.70%**	**58.73%**
IA Global	0.36%	13.53%	47.85%	45.16%
MPS Growth	**2.13%**	**15.92%**	**47.82%**	**46.07%**
IA Flexible Investment	0.82%	12.77%	40.91%	33.40%
MPS Balanced	**1.35%**	**12.88%**	**39.93%**	**34.05%**
IA Mixed Investment 40%-85% Shares	0.74%	12.01%	39.42%	31.67%
MPS Balanced Lower Equity	**0.73%**	**10.58%**	**34.36%**	**25.72%**
IA Mixed Investment 20%-60% Shares	-0.13%	8.25%	30.11%	21.23%
MPS Defensive	**0.70%**	**9.46%**	**30.06%**	**19.95%**
IA Mixed Investment 20%-60% Shares	-0.13%	8.25%	30.11%	21.23%
MPS Conservative	**0.39%**	**8.24%**	**26.84%**	**15.32%**
IA Mixed Investment 20%-60% Shares	-0.13%	8.25%	30.11%	21.23%
MPS Cautious	**-0.98%**	**4.08%**	**17.87%**	**9.39%**
IA Mixed Investment 0%-35% Shares	-0.88%	4.77%	21.95%	10.14%

Source: Quilter Cheviot, FE fundinfo, 5 October. All figures to 30 September 2026. Strategy performance is shown in GBP, net of Quilter Cheviot's MPS (Platform) annual management charge and underlying funds costs with all income reinvested, actual returns may vary. External platform custody charges are not included. Where investments are held in Quilter Cheviot custody there is an additional 0.25% charge. Strategy data comprises MPS (Platform) returns. IA sector returns are net of the underlying fund manager charges.

To calculate performance, the MPS Defensive strategy figures are composed of simulated model performance up to 31 October 2023 and actual model performance thereafter. The underlying holdings in this simulated model performance are similar to those illustrated in this strategy. To calculate performance, MPS Cautious strategy figures are composed of model performance in Quilter Cheviot's custody up to 31 October 2023, and actual model performance thereafter. The underlying holdings in this model are similar to those illustrated in this strategy. Market and economic conditions will change over time and these and other future developments will impact the future risks and returns of asset classes. The simulated past performance data and actual past performance data is not a reliable indicator of how this strategy will perform in the future. Actual results will differ.

Asset Class / Regional Equity Allocation

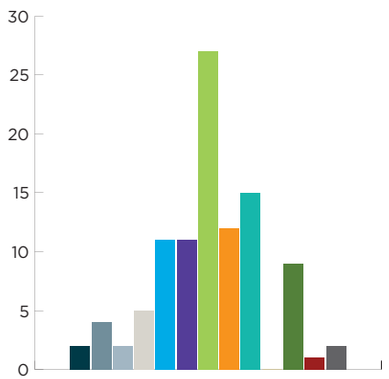
As at 30 September 2026



Direct Equity Sector Positioning

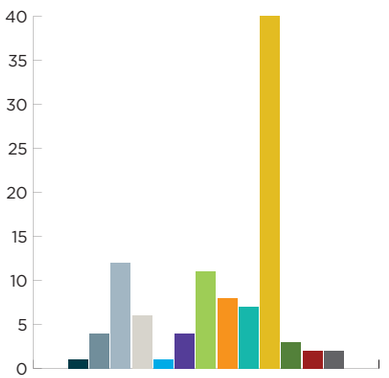
As at 30 September 2026

UK Equity Fund
Sector Exposure (%)



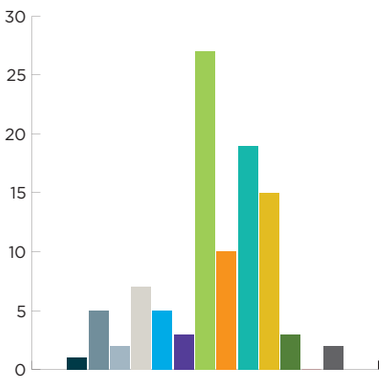
Cash Products	2%
Collectives	4%
Communication Services	2%
Consumer Discretionary	5%
Consumer Staples	11%
Energy	11%
Financials	27%
Health Care	12%
Industrials	15%
Information Technology	0%
Materials	9%
Real Estate	1%
Utilities	2%

North American Equity Fund
Sector Exposure (%)



Cash Products	1%
Collectives	4%
Communication Services	12%
Consumer Discretionary	6%
Consumer Staples	1%
Energy	4%
Financials	11%
Health Care	8%
Industrials	7%
Information Technology	40%
Materials	3%
Real Estate	2%
Utilities	2%

European Equity Fund
Sector Exposure (%)



Cash Products	1%
Collectives	5%
Communication Services	2%
Consumer Discretionary	7%
Consumer Staples	5%
Energy	3%
Financials	27%
Health Care	10%
Industrials	19%
Information Technology	15%
Materials	3%
Real Estate	0%
Utilities	2%

Q3 2026 Key Strategy Activity

We maintained the strategies' headline asset allocations over the quarter, while making targeted adjustments within the underlying 'Building Block' funds.

July

In July, we trimmed **Energy** exposure, reducing **BP** in the UK, **TotalEnergies** in Europe and **ExxonMobil** in North America. While retaining a healthy allocation to the sector, particularly in the UK, these changes reflect our view that the risk of dramatic escalation in the Persian Gulf has diminished, and that a gradual normalisation of oil transit flows could ease pressure on oil prices.

Within the UK allocation, we increased the position in **Rolls-Royce Holdings**. While concerns remain that the ongoing conflict in the Middle East could weigh on global air travel demand and increase jet fuel costs, we continue to view Rolls-Royce as a high-quality business that is executing strongly across its Civil Aerospace, Defence and Power Systems divisions, with scope for further earnings upgrades.

Across the European holdings, we reduced the strategies' position in **Siemens Healthineers**. The decision reflected a number of near-term overhangs, including uncertainty surrounding the Siemens stake and a potential spin-out of the diagnostics business, both of which could constrain share price performance until greater clarity emerges. The proceeds were used to increase the position in **ASML**, the global leader in the specialist machinery used to manufacture advanced semiconductor chips.

In North America, we took profits on two of the strategies' strongest recent contributors, namely **Advanced Micro Devices** and **Palo Alto Networks**, using the proceeds to broaden exposure across the AI 'stack' (the layers of hardware, computing infrastructure, software and applications that together make AI possible). We increased the position in memory chip manufacturer **Micron** and initiated a holding in **Seagate Technology Holdings**, one of the world's leading data storage companies and a major supplier of hard disk drives (HDDs) to cloud providers, data centres and enterprises. We believe the company's strong technological roadmap, disciplined industry supply dynamics, improving pricing power and rising demand from hyperscale data centres support the potential for strong revenue growth, expanding margins and growing free cash flow.



Image: iStock

Q3 2026 Key Strategy Activity

Within the Japanese equity allocation, we exited the remaining exposure to the **Baillie Gifford Japanese Income Growth** fund in favour of **M&G Japan**, reflecting our stronger conviction in the manager's approach and stock selection.

Lastly, we selectively increased exposure to corporate credit while reducing conventional gilt holdings. Within the medium-risk strategies and above, we also increased the active component of the corporate bond allocation, introducing the **Schroder Sterling Corporate Bond** fund and reducing the holding in the **Vanguard UK Investment Grade Bond Index** fund. The Schroder team retains a flexible, high-conviction approach, with a greater focus on smaller and medium-sized issuers than the larger companies that dominate the index. We believe this provides access to a broader opportunity set and greater scope to add value through individual bond selection.

August

In August, we exited **Segro**, the owner, manager and developer of warehouse and industrial property. Having only been reintroduced to the strategies' UK allocation in March, the stock became the latest target of M&A activity in the UK real estate sector, with the company agreeing to be acquired by Prologis, the US-based logistics property giant. While the transaction is awaiting final completion, the share price had already risen strongly, prompting us to sell the position and redeploy the proceeds into UK banks, where we continue to see an attractive outlook supported by strong profitability in a higher-rate environment. We increased this exposure by initiating a position in **Lloyds Banking Group**.

Across the US equity allocation, we exited the residual position in **Honeywell Aerospace**, which was spun out of **Honeywell International** in June this year, following a disappointing August trading update that included a reduction in full-year guidance. We believe any recovery is likely to take time, so used the proceeds to further increase the position in **Seagate Technology Holdings**, where our conviction remains higher.

In Europe, we made a similar move to increase the allocation's exposure to banks, adding to **Nordea Bank** and funding the purchase through a reduction in **Sika**, the global specialty chemicals company.

Finally, within the strategies' alternative investment exposure, we increased the holding in the **Jupiter Merian Global Equity Absolute Return** fund. The fund has performed well since its introduction in December last year and continues to provide valuable diversification benefits within the broader portfolio.

September

During the month, we added a new holding in **Landsec**, one of the UK's largest real estate investment trusts (REITs). The company provides exposure to London West End offices and UK shopping centres, two areas of the property market that have proved more resilient than many investors expected. While we remain measured in our outlook for the sector, the purchase helps reduce the 'underweight' position created by our exit from Segro in the preceding month. The move was funded through a reduction in the still-significant holding in **AstraZeneca**. We also further increased the position in **Rolls-Royce Holdings**, largely for risk-management purposes, funding the purchase intra-sector by trimming **BAE Systems**, which remains an 'overweight' position and one of our highest-conviction holdings.

In Europe, we introduced a new position in **Kingspan**, the building materials group, funded by the sale of **Schindler**. Kingspan's insulation, roofing and critical infrastructure businesses stand to benefit should the prolonged downturn in European construction activity be nearing an end. Its exposure to cooling, ventilation and energy-efficiency solutions for data centres also provides a structural growth opportunity linked to continued investment in AI. While Schindler remains a high-quality business, we believe Kingspan offers a more compelling combination of cyclical recovery potential and long-term structural growth.

Q3 2026 Key Strategy Activity *New purchase/position increase*

Please note this is not a comprehensive list of trades over the quarter, but a summary of key investment decisions driven primarily by stock and sector recommendations.

Date	Building Block	Trade	Holdings	Sector
July	North American Equity	Position Increase	S&P Global Inc Com USD1	Financials
July	North American Equity	Position Increase	Micron Technology Inc Com USD0.10	Information Technology
July	North American Equity	New position	Seagate Technology Holdings Plc Com USD0.00001	Information Technology
August	North American Equity	Position Increase	Seagate Technology Holdings Plc Com USD0.00001	Information Technology
July	UK Equity	Position Increase	Rolls-Royce Holdings ord GBP0.20	Industrials
August	UK Equity	New position	Lloyds Banking Group ord GBP0.1	Financials
September	UK Equity	Position Increase	Rolls-Royce Holdings ord GBP0.20	Industrials
September	UK Equity	New position	Land Securities Group Plc ord GBP0.106666666	Real Estate
July	European Equity	Position Increase	ASML Holding NV EUR0.09	Information Technology
August	European Equity	Position Increase	Nordea Bank ABP NPV	Financials
September	European Equity	New position	Kingspan Group ord EUR0.13	Industrials
July	Asian & Emerging Markets Equity	Position Increase	M&G Investment Funds (1) M&G Japan Sterling PP Dis	Equities - Japan
July	Fixed Interest	Position Increase	Vontobel Fund SICAV Twentyfour Strat Inc Aqg GBP Dis	Fixed Interest - Overseas
July	Fixed Interest	New position	Schroder Investment Fund Company Schroder Sterling Corporate Bond Q Dis	Other UK Fixed Interest
July	Conservative Fixed Interest	Position Increase	Premier Miton Income Funds ICVC Premier Miton Corp Bd Monthly Inc C Dis	Other UK Fixed Interest
July	Conservative Fixed Interest	Position Increase	United Kingdom(Government of) 4.125% Bds 29/01/2027 GBP1000	UK Government Securities
August	Alternatives	Position Increase	Jupiter Asset Management Series Plc Jptr Merian Gbl Eqt Abs Rtn U2 GBP Acc H	Absolute Return

Q3 2026 Key Strategy Activity *Outright sale/position reduction*

Please note this is not a comprehensive list of trades over the quarter, but a summary of key investment decisions driven primarily by stock and sector recommendations.

Date	Building Block	Trade	Holdings	Sector
July	North American Equity	Position Reduction	Exxonmobil Holdings Corporation Com NPV	Energy
July	North American Equity	Outright Sale	Mobility Global Inc Com USD0.01	Financials
July	North American Equity	Position Reduction	Advanced Micro Devices Inc Com Stk USD0.01	Information Technology
July	North American Equity	Position Reduction	Palo Alto Networks Inc Com USD0.0001	Information Technology
August	North American Equity	Position Reduction	Honeywell Aerospace Inc Com USD0.01	Industrials
July	UK Equity	Position Reduction	BP ord USD0.25	Energy
August	UK Equity	Outright Sale	Segro Plc ord GBP0.10	Real Estate
September	UK Equity	Position Reduction	Astrazeneca Plc ord USD0.25	Health Care
September	UK Equity	Position Reduction	BAE Systems ord GBP0.025	Industrials
July	European Equity	Position Reduction	TotalEnergies SE EUR2.5	Energy
July	European Equity	Position Reduction	Siemens Healthineers AG NPV	Health Care
August	European Equity	Position Reduction	Sika AG CHF0.01 (Reg)	Materials
September	European Equity	Outright Sale	Schindler-Hldg AG CHF0.10 (Ptg Cert)	Industrials
July	Asian & Emerging Markets Equity	Outright Sale	Baillie Gifford Inv Funds II ICVC BG Jpnese Core Growth W4 GBP Dis	Equities - Japan
July	Fixed Interest	Position Reduction	United Kingdom(Government of) 4.5% Gilt Bds 07/09/2034 GBP1000	UK Government Securities
July	Fixed Interest	Position Reduction	United Kingdom(Government of) 4.5% Gilt Snr 07/12/2042 GBP1000 'Regs'	UK Government Securities
July	Fixed Interest	Position Reduction	Vanguard Investment Series Plc UK Inv Grade Bd Idx Instl Pls GBP Dis	Other UK Fixed Interest
July	Conservative Fixed Interest	Outright Sale	United Kingdom(Government of) 1.5% Gilt Bds 22/07/2026 GBP1000	UK Government Securities
July	Conservative Fixed Interest	Position Reduction	United Kingdom(Government of) 1% Bds 31/01/2032 GBP1000	UK Government Securities
August	Alternatives	Position Reduction	Ishares III Plc UK Gilts 0-5Yr UCITS ETF GBP Dist	UK Government Securities

To view the top holdings in each Building Block fund, please see our latest factsheets.

Risk Ratings

As at 30 June 2026

	DYNAMIC PLANNER (1-10 scale)	defaqto (1-10 scale)	Risk Rated by Synaptic (SAA 1-5 scale)	OXFORD Risk (1-5 scale)	ev (1-5 scale)	FinaMetrica (Best Fit)
MPS Global Growth	7	9	5.5	4	5 (5.3)	80-100
MPS Growth	6	7	4.2	4	4 (4.4)	68-79
MPS Balanced	5	6	3.5	3	4 (3.5)	59-67
MPS Balanced Lower Equity	5	5	3.0	3	3 (2.8)	55-58
MPS Defensive	4	4	2.6	2	2 (2.2)	50-54
MPS Conservative	4	3	2.4	2	2 (1.7)	41-49
MPS Cautious	3	2	2.3	1	1 (0.8)	14-40

Responsible Investment

There are three main approaches to responsible investment that we undertake across our MPS at Quilter Cheviot. We have adopted the UN-backed Principles for Responsible Investment (PRI) framework and the points below summarise our three main approaches to responsible investment.

Stewardship

Involves engaging with the companies and funds we invest in to discuss ESG (environmental, social and governance) issues to improve their handling and disclosure of these. This may be carried out individually or in collaboration with other investors. It includes voting, either in person or by proxy, which involves formally expressing approval or disapproval through voting on resolutions.

ESG Screening

Quilter Cheviot has a firm-wide restriction on investing directly in cluster munitions and anti-personnel landmines. We also monitor any potential indirect exposure to this on an ongoing basis.

ESG Integration

Considering ESG issues in investment analysis and decisions to better manage risks and improve returns. This is integrated into the investment process and our research teams are responsible for incorporating this into their ongoing analysis of investments.

Our responsible investment team has overall responsibility for the firm's active ownership work and leads on collaborations including Climate Action 100, PRI Advance, Nature Action 100 and PRI Spring. Additionally we are members of various industry working groups including Wealth Managers on Climate and the Advisers' Sustainability Group (ASG). The team also leads on strategic and regulatory developments across the business.

For more information on responsible investment: https://www.quiltercheviot.com/our-services/responsible-investment/ and TCFD reporting https://www.quiltercheviot.com/our-services/responsible-investment/tcfd-at-quilter-cheviot/.

Quilter Cheviot's climate action plan can be found here. More information on our engagement policy can be found here.

Cost and Charges

As at 30 September 2026

The summary below takes into account Quilter Cheviot's annual management charge (AMC) and the weighted cost of the underlying collective funds held within each strategy.

These figures do not take into account your adviser's charge for their services, associated platform and/or wrapper fees or charges that may be applied by third parties. Costs and charges data for the underlying funds held within the MPS strategies is sourced from Morningstar. Where costs and charges data for a fund is not available from Morningstar, Quilter Cheviot will use alternative data sources or reasonable endeavours to estimate this figure. Please note that underlying fund costs and charges may differ dependent upon the platform on which the strategies are being accessed.

Please also note that a direct cost comparison between an MPS Strategy and a fund may not be a reliable indicator. Although Quilter Cheviot does not apply transaction charges when undertaking the rebalancing of strategy holdings, there may be external costs incurred when switching between funds.

Strategy	Quilter Cheviot AMC %*	Weighted Cost of Underlying Collective Funds %	Total %
MPS Global Growth	0.25%	0.25%	0.50%
MPS Growth	0.25%	0.30%	0.55%
MPS Balanced	0.25%	0.31%	0.56%
MPS Balanced Lower Equity	0.25%	0.33%	0.58%
MPS Defensive	0.25%	0.31%	0.56%
MPS Conservative	0.25%	0.31%	0.56%
MPS Cautious	0.25%	0.19%	0.44%

*Where investments are held in Quilter Cheviot's custody, there will be an additional charge of 0.25%. All figures are correct to 30/09/2026. Cost data sourced from Quilter Cheviot, Morningstar.

Our Platform Partners

Easily access our market-leading MPS strategies via our carefully selected range of platform partners.



Service Literature & Updates

- In depth monthly factsheets, showing top holdings in each Building Block fund, as well as strategy performance
- Service brochure, responsible investment summary and detailed quarterly review documents
- Regular updates include investment and market commentaries, webinars, vlogs from our research analysts, events and much more.



MPS October Newsletter

Watch time: **10 minutes**

Our October Managed Portfolio Service update covering a review of market activity, strategy performance, portfolio activity and the outlook for the year ahead.



MPS in the Loop - Macro

Watch time: **10 minutes**

In our latest edition of MPS in the Loop, Darragh Moore sits down with Investment Strategist, Tim Armitage, to discuss how our asset allocation committee is navigating an increasingly complex global backdrop.



Our experts are here to help you

Contact us today to find out how we can support you and your clients.

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Disclaimer

The value of investments and the income from them can go down as well as up. You may not recover what you invest. There are risks involved with this type of investment.

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