



QUILTER CHEVIOT

# Managed Portfolio Service

*A service designed with you in mind*

FOR CLIENTS ONLY



SPECIALISTS IN INVESTMENT MANAGEMENT

# Introducing you to Quilter Cheviot

## We are leaders in investment management

For over 250 years we have been helping our clients find the right investment solution for their individual situation.

As one of the largest discretionary investment management firms in the UK, we are now trusted by over 36,000 clients to manage £32.5 billion of assets under management as at 31 December 2025.

## Our award-winning MPS

Our Managed Portfolio Service (MPS) is designed to provide you with a straightforward, cost-effective way to benefit from our investment experience, so that you and your family can make the most of your investments for generations to come.



## A warm welcome from our Managed Portfolio Service team

Left to right:

**Simon Doherty**,  
Head of Managed  
Portfolio Service;  
**Antony Webb**,  
Head of MPS  
Investment Funds

“ Whether you’re looking to grow or preserve your wealth, plan for retirement or take care of your loved ones’ future, we have designed our Managed Portfolio Service with you in mind.”

**Simon Doherty**, Head of Managed Portfolio Service

# How can we help you?

## **A unique strategic investment approach**

### **Page 4**

We offer seven actively managed, multi-asset strategies constructed using our unique 'Building Blocks' approach.

This pioneering approach offers our clients exposure to a greater range of investment opportunities and asset classes than is possible within a 'traditional' MPS.



## **Investment decisions based on industry-leading research**

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Decisions around the investments held in each strategy are made based on expert recommendations.

You will have access to insights provided by our leading equity and fund research teams. Each analyst is experienced in delivering exceptional results.

## **Exceptional service**

### **Page 8**

We've designed our business with you in mind. We're dedicated to getting to know you, so that we can ensure you're getting the best from investing with us.



# Our unique strategic approach

## Our Building Blocks

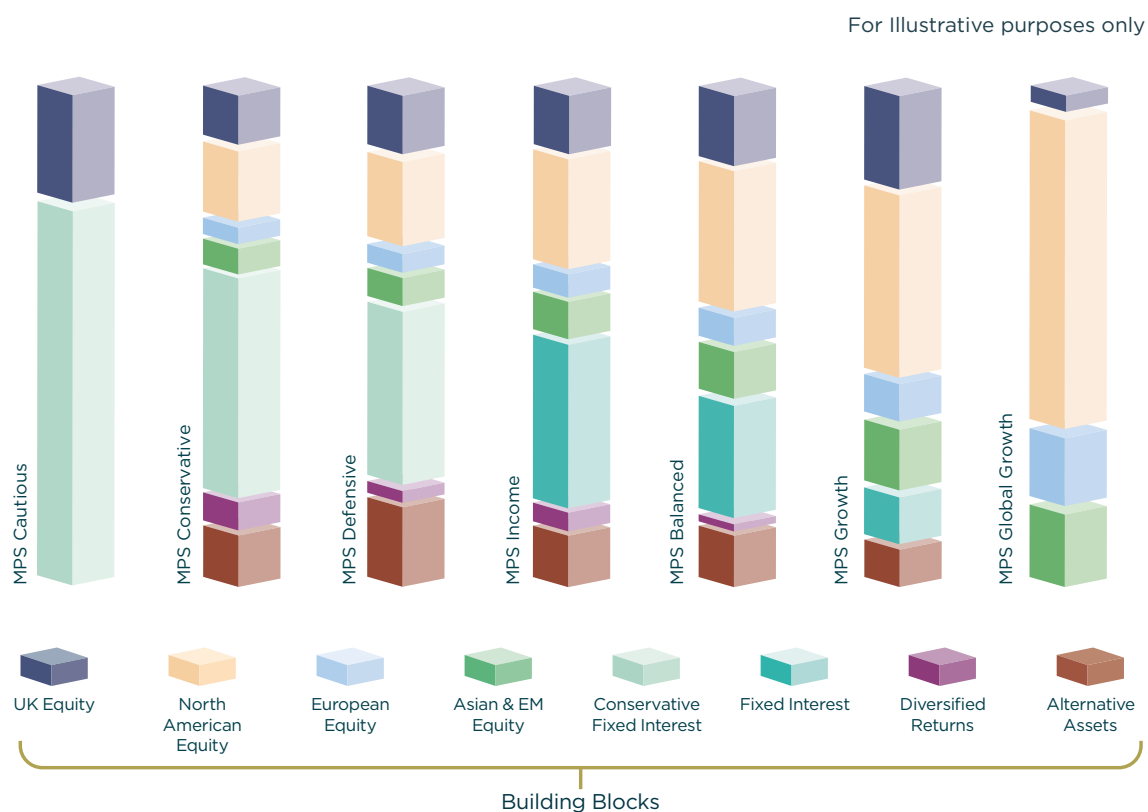
The seven MPS strategies are constructed using 'Building Blocks' - a range of funds designed and actively managed by Quilter Cheviot exclusively for use within our MPS.

Each Building Block is designed to provide specific geographic or asset class exposure, and invests in a combination of direct equities, bonds or external fund holdings.

Working in partnership with our experienced research colleagues, the MPS team carefully select those investments which form the eight individual Building Blocks.

The Building Blocks are then used to build a range of MPS strategies with differing investment objectives and risk characteristics.

## How our Building Blocks form our MPS strategies



This innovative structure ensures a best-in-class investment management solution that is both nimble in nature and active in its approach.

## *How does our approach benefit you?*

The Building Blocks approach allows us to have greater control when crafting our portfolios which means you can enjoy:



### **A well-diversified portfolio**

The flexibility of the Building Blocks structure provides you with access to a greater range of investment opportunities and asset classes than is possible with a 'traditional' MPS approach.



### **More value for your investments**

Investing in direct equities and bonds significantly reduces the cost of investing for you, compared to a fund-only MPS.



### **Efficient investment implementation**

Our Building Blocks approach allows us to be more agile than traditional MPS solutions, with investment changes implemented without the need for wholesale strategy rebalancing.

Minimum investment amount: £20,000\*

\*£40,000 for clients without a financial adviser

# Finding the best investment opportunities

*Our experienced MPS team are responsible for running the strategies and managing the underlying Building Blocks, ensuring full control of the portfolio construction process.*

**Each MPS strategy is carefully crafted, drawing on the insights from our expert teams of equity and fund research analysts to shape the exposures.**

## **Our Equity Research Team**

Our team of equity analysts sits at the heart of our investment process. The team has established an excellent performance track record across the equity markets they cover.

The team's expertise span a range of global sectors including: Energy, Materials, Industrials, Consumer Discretionary, Consumer Staples, Health Care, Financials, Information Technology, Communication Services, Utilities and Real Estate.

## **Our Fund Research Team**

Our award-winning team of fund analysts provide invaluable insight on collective investments for our MPS team.

From more than 40,000+ funds, they actively monitor more than 320. These include open-ended funds, investment companies, exchange-traded funds (ETFs) and index-tracking investments.



## **Find out more**

If you would like to receive the latest insights from our research analysts and regular updates from the MPS team, visit:

**[www.quiltercheviot.com/subscribe](http://www.quiltercheviot.com/subscribe)**





## Our initial research universe

**Global Equities 1,600+**

**Collective Funds 40,000+**

**Fixed Interest 30,000+**

Meeting Management

Face to Face Meetings

Sovereign Bonds

Industry Analysis

Fund Structure

Investment Grade Bonds

Company Analysis

Risk Controls

Credit Rating

Structural Themes

Performance Analysis

Interest Rate Outlook

## Our hand-picked watchlist

**Global Equities 350+**

**Collective Funds 320+**

**Fixed Interest 150+**

## Our Building Block Funds



UK Equity



North American Equity



European Equity



Asian & EM Equity



Conservative Fixed Interest



Fixed Interest



Diversified Returns



Alternative Assets

# Our approach to Responsible investing



As a responsible investor Quilter Cheviot is committed to our role as a steward of clients' assets in order to protect and enhance long-term returns. This encompasses our engagement with investee companies, through proxy voting and face-to-face dialogue, as well as considering environmental, social and governance (ESG) factors which could impact shareholder returns. This is our firmwide approach which applies across our investment strategies.

We have adopted the Investment Association's Responsible Investment Framework. The following points summarise our three main approaches to responsible investment.

**Stewardship:** This involves engaging with companies to discuss ESG issues to improve their handling and disclosure of such issues.

**ESG Screening:** We have 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:** This is the explicit and systematic inclusion of ESG issues in investment analysis and decisions - to better manage risks and improve returns.

\*A number of international conventions and treaties prohibit or limit the use and availability of these weapons.

A photograph of a woman with dark curly hair, wearing a light green halter top, smiling broadly. A young girl with dark curly hair, wearing a yellow patterned dress, is kissing her on the cheek. They are in a room with white shelves in the background.

## A service that gives you added value

At Quilter Cheviot, we go above and beyond to deliver the best experience for our clients. That's why with our Managed Portfolio Service, we're proud to offer you:



**Seamless access to your investments** - Our online platform works around you. So wherever you are, you will have access to your investments right at your fingertips.



**Exceptional on-going support** - Throughout your investing journey we will support you with advice and helpful updates so you're always informed about your investments.



**Easy-to-read reports** - Stay up-to-date with your portfolio performance through our regular, easy-to-read reporting, commentaries and video updates from the MPS team.

# Let's start our journey together

The Quilter Cheviot Managed Portfolio Service team has a 20-year track record of delivering successful investment outcomes.

Find out more about the service from meeting our expert team, how they'll work with you, to understanding which of our strategies is right for you.



# Our offices

- 1 Belfast
- 2 Birmingham
- 3 Bristol
- 4 Dublin
- 5 Edinburgh
- 6 Glasgow
- 7 Jersey
- 8 Leeds
- 9 Leicester
- 10 Liverpool
- 11 London
- 12 Manchester
- 13 Salisbury



*Speak to our helpful team today*

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

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**Email.** [enquiries@quiltercheviot.com](mailto:enquiries@quiltercheviot.com)

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**This is a marketing communication.**

**Investors should remember that the value of investments, and the income from them, can go down as well as up and that past performance is no guarantee of future returns. You may not recover what you invest.**

Quilter Cheviot and Quilter Cheviot Investment Management are trading names of Quilter Cheviot Limited. Quilter Cheviot Limited is registered in England and Wales with number 01923571, registered office at Senator House, 85 Queen Victoria Street, London, EC4V 4AB. Quilter Cheviot Limited is a member of the London Stock Exchange and authorised and regulated by the UK Financial Conduct Authority and as an approved Financial Services Provider by the Financial Sector Conduct Authority in South Africa.