

Managed Portfolio Service

Discover the power of our investment expertise



SPECIALISTS IN INVESTMENT MANAGEMENT

Introducing you to Quilter Cheviot

For over 25 years we have been helping financial advisers like you provide the right investment solutions for your clients.

We fundamentally believe in the value of financial advice, and have developed our services and strategies alongside the financial advice community, to make it easier for you to deliver exceptional client outcomes.

Our award-winning MPS

Our Managed Portfolio Service (MPS) is designed to provide your clients with a straightforward, cost-effective way to benefit from our investment experience, so that they can make the most of their 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 your client wants to preserve or grow their wealth, our MPS strategies have been designed with their goals in mind. We go the extra mile to ensure that you and your client are supported at every stage of the investment journey.”

Why you should choose Quilter Cheviot's MPS

Unique strategic approach

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

This pioneering approach offers 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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You will have access to insights provided by our leading equity and fund research teams. Each analyst is experienced in delivering expert recommendations.

Exceptional service

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Our business has been designed with you and your clients in mind. We are dedicated to ensuring that you and your clients are getting value at every stage of your relationship with us.



Our unique strategic approach

Our Building Blocks

The 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.

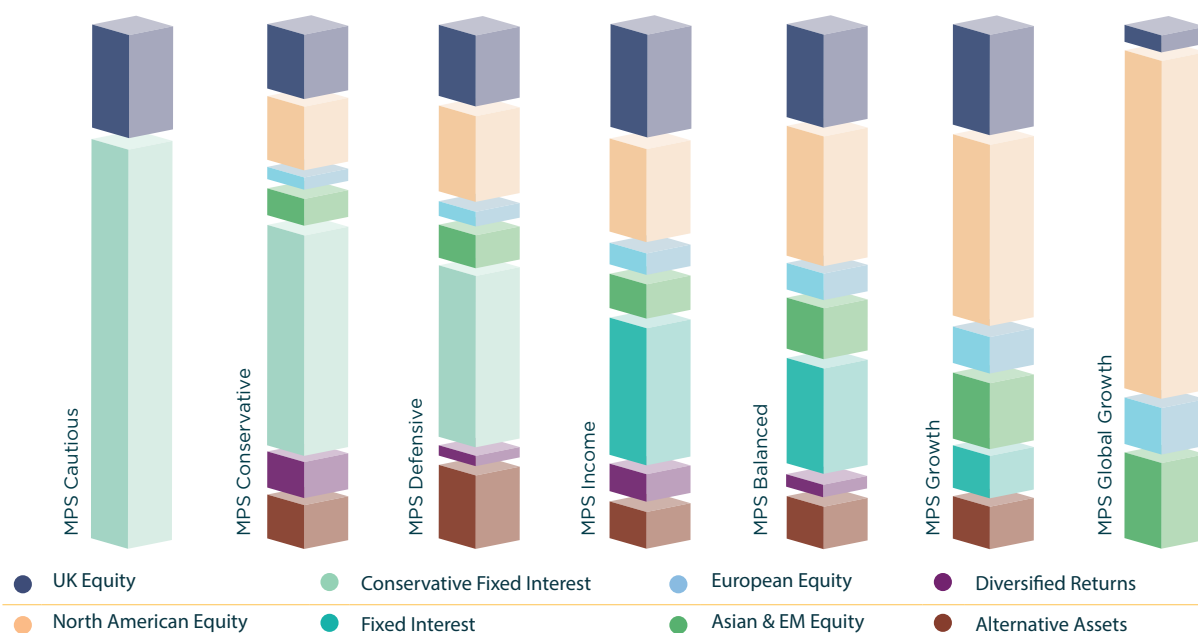
Working in partnership with our experienced research colleagues, the MPS team carefully select those investments which form the eight individual Building Blocks.

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

How our Building Blocks form our MPS strategies

The seven MPS Strategies

For Illustrative purposes only



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

How can our approach benefit you and your clients?



Additional diversification opportunities

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



A market-leading service at competitive costs

Investing in direct equities and bonds, rather than solely third-party funds significantly reduces costs for your clients. Furthermore, we do not charge a fund management fee for the running of the Building Blocks, maximising the cost reductions afforded by the structure.



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.

Risk mapped strategies

To help you determine the right strategy for your clients, the strategies have been mapped by six independent risk profiling services.



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 of our expert teams of equity and fund research analysts to shape the exposures.

Our Equity Research Team

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

The team's expertise spans 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





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

Adding value for you and your clients

At Quilter Cheviot, our aim is to help you deliver exceptional advice and outstanding investment outcomes for your clients.

We've built our Managed Portfolio Service with you in mind, so that we can support your business for years to come.

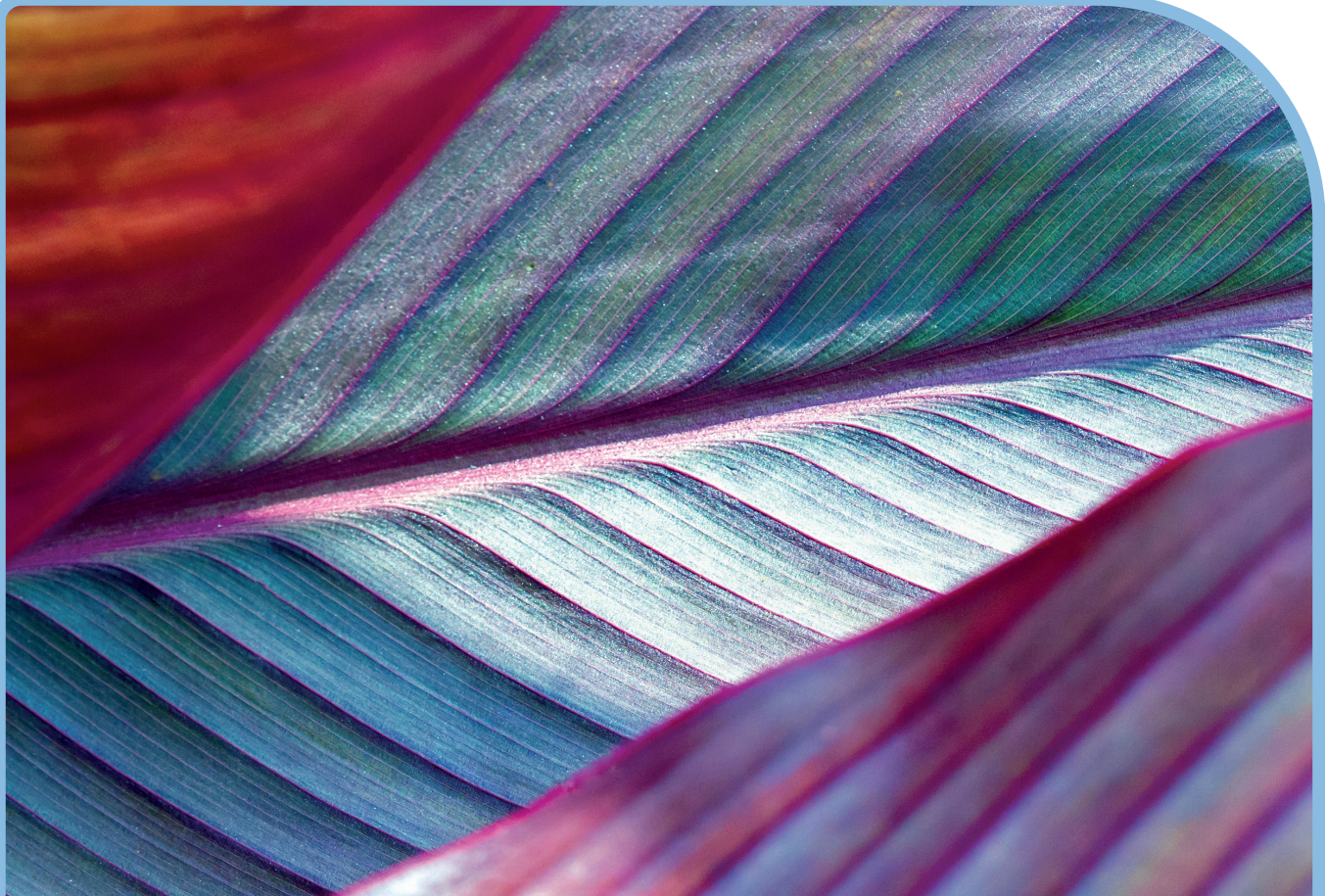
For your clients, we provide:

- ✓ **A best-in-class MPS solution** with a longer track record than most equivalent offerings in the market.
- ✓ **Straightforward access** to our strategies through our range of carefully selected platform providers or directly with Quilter Cheviot.
- ✓ **An exclusive service** at a transparent and competitive price.

For you, we provide:

- ✓ **Regular portfolio re-balancing**, so that you're always able to meet your clients' unique needs.
- ✓ **Monthly factsheets**, so you are always on top of your clients' investments.
- ✓ The latest insights from our research team **including investment commentaries, webinars, vlogs, events, newsletters** and more.





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 points below 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.

Let's start our journey together

We look forward to welcoming you to our community of over 3,000 advisers, so that you enjoy more time to focus on developing your core business, building valuable client relationships and providing truly holistic financial planning.

How to access the MPS:

Our exclusive platform partners

You can easily access our market-leading MPS strategies via our carefully selected range of platform partners.

Our own nominee arrangements

For clients working with an adviser with £20,000 or more to invest, we are pleased to offer the option of investing directly through our nominee arrangements.

All of our strategies are available through an extensive range of tax-efficient wrappers including ISA's, SIPPs and Offshore Bonds, so that you can help your clients make the most of their investments.

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abrdn

LEGON

AJBell

AVIVA

Benchmark

Fidelity
INTERNATIONAL

Fundment

Hubwise
YOUR PLATFORM SOLUTION

M&G wealth

MORNINGSTAR

nucleus

Quilter

SCOTTISH WIDOWS

TITAN
Wealth Solutions

transact
take control

wealthtime



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 and your clients.

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Email. enquiries@quiltercheviot.com



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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. This document is directed at and is intended to be viewed by investment professionals only; it should not be disseminated to or relied upon by any other person.