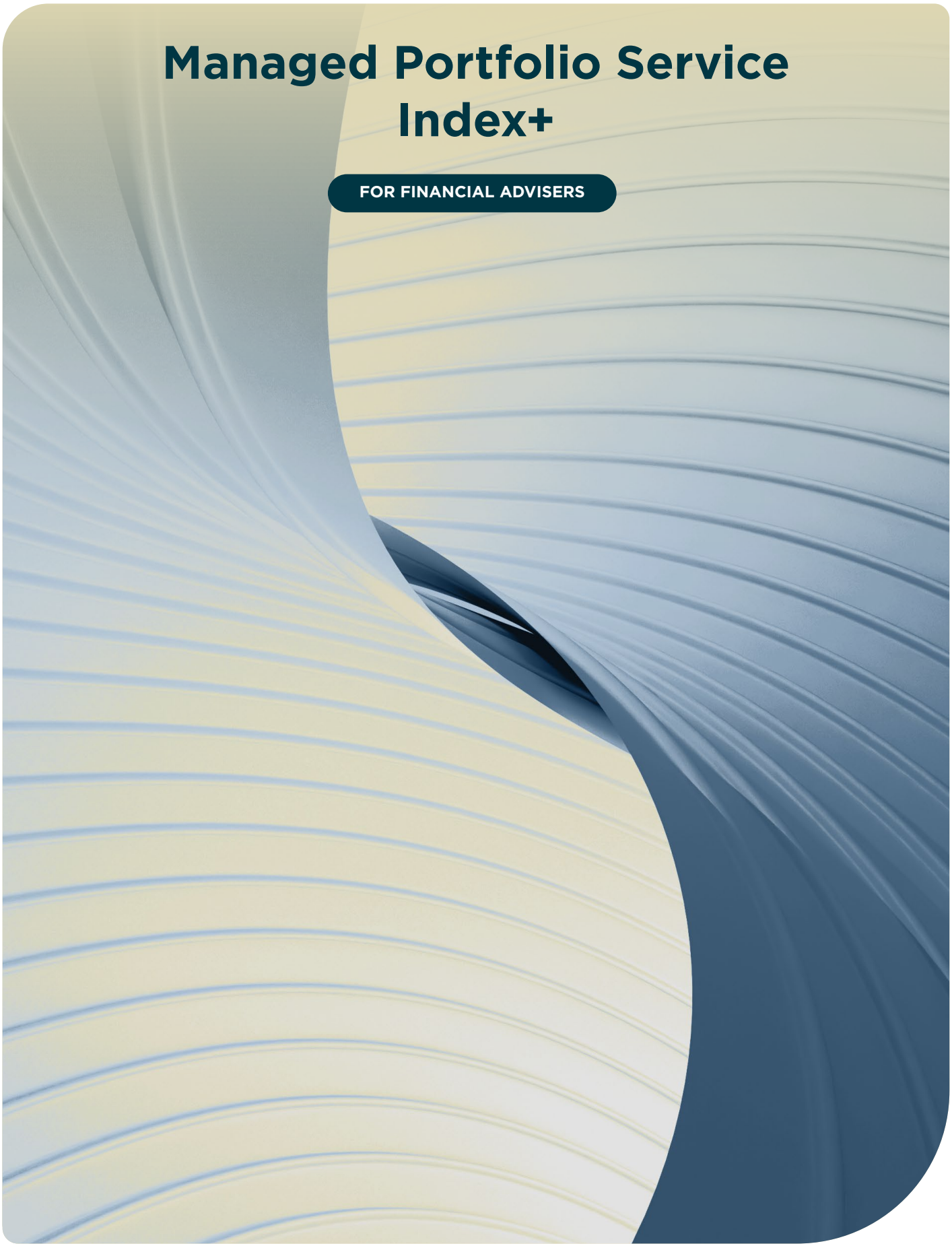
QUILTER CHEVIOT

Managed Portfolio Service Index+

FOR FINANCIAL ADVISERS



INVESTMENT MANAGEMENT

Active decision-making with index implementation

The Quilter Cheviot MPS Index+ range gives you a cost-efficient investment solution without compromising on investment expertise, governance or diversification.

The portfolios are implemented predominantly through index-tracking funds, actively managed by our MPS team. Asset allocation, selection, portfolio positioning and ongoing risk management decisions driven by our investment process, drawing on the same research capability, specialist expertise and institutional resource available across Quilter Cheviot.

Index+ is more than a passive portfolio range. It also provides access to Quilter Cheviot Alternatives Building Blocks, extending diversification.

Choice

Seven actively managed strategies constructed predominantly, but not entirely, using index-tracking funds

Diversification

A whole-of-market approach to fund selection incorporating both traditional and alternative asset classes

Expertise

Managed by an experienced investment team supported by a dedicated team of fund research analysts

Support

Support from our Business Development Managers providing you with consistent, local support

Consistency

Consistent underlying holdings across the range make it easier to use across your clients.

Not just another passive portfolio range.

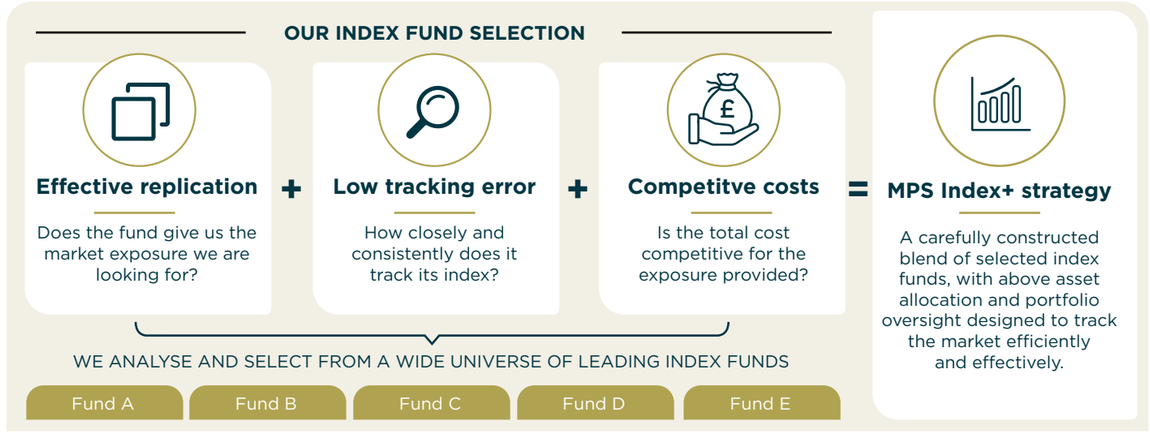
MPS Index+ combines cost-effective, index-led implementation with access to alternative investments, expanding the investment opportunity beyond traditional equity and bond markets.

A smarter way to track the market

MPS Index+ takes a more considered approach to index investing, actively selecting how we access each market rather than simply choosing the cheapest tracker.

There can be several ways to gain exposure to the same market. We select index-tracking funds we believe offer the right combination of effective replication, low tracking error and competitive cost.

We analyse a broad universe of funds to identify those we believe are best suited to delivering the exposure efficiently and consistently.



We believe that cost matters, but so does what you get for it.

What we offer

Regular updates: Monthly factsheets, regular rebalancing, investment commentaries and monthly video updates.

Consistency across your CIP: With seven risk-rated portfolios aligned to different risk profiles, advisers can support cost-conscious clients without increasing CIP complexity.

Research driven: Benefiting from one of the largest research teams within the discretionary fund management industry, the strategies combine the in-depth output from our sector-specialist, global analysts with the portfolio construction expertise of our MPS team.

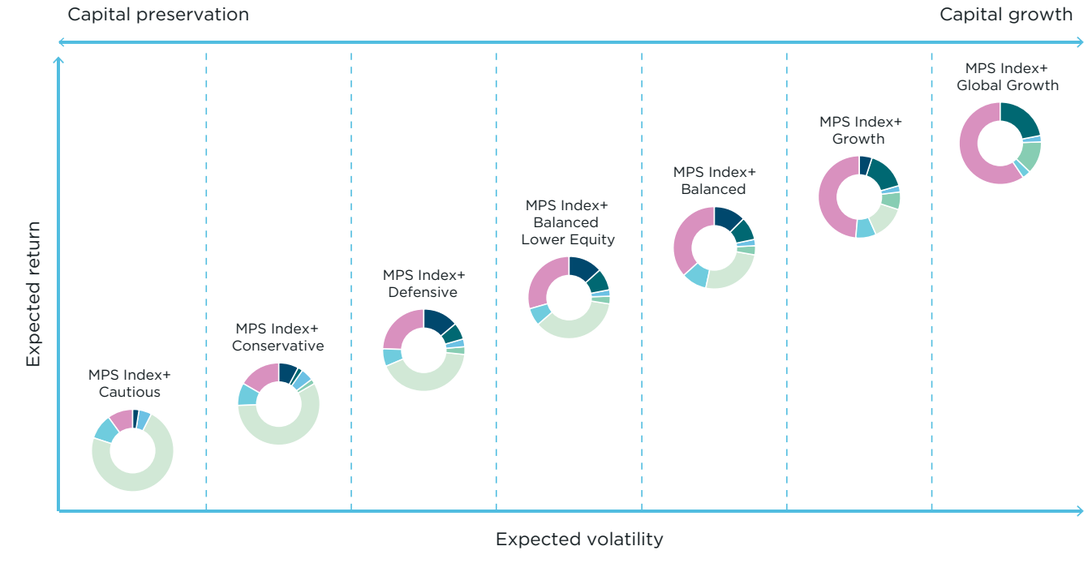
A focus on costs: Investing predominantly (but not exclusively) in passive funds, the strategies provide a cost-effective way of accessing a professionally managed investment portfolio.

A proven track record: Since launching, the strategies have continued to deliver successful outcomes for clients in line with their stated investment objectives and risk profiles.

INVESTMENT MANAGEMENT

MPS Index+ strategies

Strategy asset allocation



Asset allocations are for illustrative purposes only based upon strategy weightings as at 30 September 2026.

MPS Index+ costs and charges

Via platform

Strategy	Quilter Cheviot AMC %	Weighted Cost of Underlying Collective Funds %	Total %
MPS Index+ Global Growth	0.20%	0.08%	0.28%
MPS Index+ Growth	0.20%	0.11%	0.31%
MPS Index+ Balanced	0.20%	0.13%	0.33%
MPS Index+ Balanced Lower Equity	0.20%	0.14%	0.34%
MPS Index+ Defensive	0.20%	0.12%	0.32%
MPS Index+ Conservative	0.20%	0.12%	0.32%
MPS Index+ Cautious	0.20%	0.07%	0.27%

Via Quilter Cheviot's nominee arrangements (includes custody)

Strategy	Quilter Cheviot AMC %	Weighted Cost of Underlying Collective Funds %	Total %
MPS Index+ Global Growth	0.50%	0.08%	0.58%
MPS Index+ Growth	0.50%	0.09%	0.59%
MPS Index+ Balanced	0.50%	0.11%	0.61%
MPS Index+ Balanced Lower Equity	0.50%	0.11%	0.61%
MPS Index+ Defensive	0.50%	0.12%	0.62%
MPS Index+ Conservative	0.50%	0.09%	0.59%
MPS Index+ Cautious	0.50%	0.07%	0.57%

Sources: Morningstar and Quilter Cheviot. All figures correct to 26 October 2026.

INVESTMENT MANAGEMENT

MPS Index+ risk ratings and platform partners

Quilter Cheviot MPS Index+ Risk Level	Distribution Technology's Dynamic Planner (1-10 scale)	Defaqto (1-10 scale)	Oxford Risk (1-5 scale)	EValue (1-5 scale)	Morningstar (Best Fit)
Global Growth	7	9	4	5 (5.3)	73
Growth	6	7	4	4 (4.4)	69
Balanced	5	6	3	4 (3.6)	54
Balanced Lower Equity	5	5	3	3 (2.9)	43
Defensive	4	4	2	2 (2.5)	35
Conservative	4	3	2	2 (2.0)	27
Cautious	3	2	1	1 (1.0)	23

How to access the MPS Index+ strategies

Available directly or through one of our platform partners:

7IM · abrdn · AVIVA · Benchmark · Fundment · M&G wealth · Quilter · SCOTTISH WIDOWS · transact take control · wealthtime

Tax-efficient wrappers

All our strategies are available through an extensive range of tax-efficient wrappers, so that your clients can make the most of their investments:



A warm welcome

The Quilter Cheviot MPS team has a 25-year track record of delivering successful client outcomes, and a proud reputation for innovative partnerships with financial advisers. The team comprises a dedicated Investment Management capability that sits at the heart of the Quilter Cheviot investment process as well as platform and services specialists focused on ensuring the smooth running of all aspects of the service.



Simon Doherty
Head of Managed Portfolio Services

Simon is Head of Managed Portfolio Services and a member of Quilter Cheviot's Asset Allocation, UK Stock Selection and Investment Funds Committees. Simon is a Chartered Fellow of the Chartered Institute for Securities & Investment (CISI). He has completed the CISI Masters in Wealth Management, the Investment Management Certificate (IMC) and holds the CFA Institute Certificate in ESG Investing. Simon joined Quilter Cheviot in 2007 and is a graduate of Trinity College Dublin with a first-class honours degree.



Antony Webb
Head of MPS Investment Funds

Antony joined Quilter Cheviot in 2010 after studying economics at University College London (UCL). Joining Quilter Cheviot was an opportunity to put theory into practice, whilst also furthering his study through the Investment Management Certificate (IMC) and the CISI Masters in Wealth Management, as well as sitting on the firm's Investment Funds Committee.

Contact us

1. Belfast
2. Birmingham
3. Bristol
4. Edinburgh
5. Glasgow
6. Leeds
7. Leicester
8. Liverpool
9. London
10. Manchester
11. Salisbury



Scan to contact us or find your local Business Development Manager

Quilter Cheviot
Senator House
85 Queen Victoria Street
London EC4V 4AB
+44 (0)20 7150 4000

+44 (0)20 7150 4000 **enquiries@quiltercheviot.com** **quiltercheviot.com**

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, 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.

QUILTER CHEVIOT

INVESTMENT MANAGEMENT

QC00158 (10/2026)