

## MPH

### Portfolio Strategy

#### Portfolio Objective:

Our MPH strategy offers an aggressive approach, entirely invested in high-risk investments, but offering access to higher potential returns. Changes to MPH are made on an ad-hoc basis. This strategy is best suited to clients with a long-term investment horizon (5+ years) to negate risk. Due to this portfolio's exposure to risk and subsequent volatility, we advise that only 10% of your combined portfolio value be subjected to this strategy.

#### Attitude to Risk:



Low Risk

High Risk

#### Client Suitability:

Suitable for clients who:

- Are more Adventurous of their investments,
- Have previous investment experience and can highly appreciate risk.

# PORTFOLIO BREAKDOWN

Asset Class	V23A
<b>Cash</b>	<b>4%</b>
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<b>UK Equity</b>	<b>6%</b>
IFSL Marlborough UK Micro-Cap Growth	6%
<b>Overseas Equity</b>	<b>40%</b>
Baillie Gifford Shin Nippon	8%
First Trust Dow Jones Internet	6%
Redwheel Next Generation Emerging	5%
Schroder Asian Alpha Plus	15%
Stewart Investors - Indian subcontinent sustainability	6%
<b>Specialist</b>	<b>50%</b>
Amati Strategic Innovation	6%
AXA Framlington Biotech	8%
Baillie Gifford Scottish Mortgage Investment Trust	8%
First Sentier Global Listed Infrastructure	12%
First Trust Nasdaq clean edge smart grid infrastructure	8%
Sanlam Global Artificial Intelligence	8%
<b>Total Investment Charges</b>	<b>0.96% (Approx)</b>

**Emerging Markets:** The portfolio may invest in emerging markets, which can result in political and economic instability, low liquidity, and currency exchange rate fluctuations, leading to higher risk.

**Exchange Rate:** The portfolio may invest in securities denominated in different currencies, causing the value of investments and any income from them to fluctuate based on exchange rate changes.

**Geared Investments:** Funds may carry more risk than equity investments due to the underlying investments. The fund may suffer sudden and large falls in value, leading to a high loss or even complete loss of investment.

**Property Funds:** The portfolio may invest in physical property, which could lead to delays in selling and affect your retirement goals. Property value is often based on a valuer's opinion, not fact. Consider carefully before investing.

**Sector Specific Funds:** May carry higher risk. The portfolio invests in specific markets or sectors, which can be more volatile than investments spread across multiple sectors. Technology and gold focused funds, for example, may suffer due to their underlying stocks being less liquid and more volatile.

**Smaller Companies:** The portfolio may invest in smaller companies which have higher risk due to shares being more volatile and less liquid.

### Important information

These funds may carry more risk than equity investments due to the underlying investments. The fund may suffer sudden and large falls in value, leading to a high loss or even complete loss of investment.

The portfolio may invest in smaller companies which are higher risk due to shares being more volatile and less liquid.

This factsheet is for information only and should not be seen as advice or a recommendation. Please seek independent financial advice before taking any action.

### Customer Information

The Reeves customer support team is on hand to answer your questions 0800 989 0029.