



QUANTQUAL

INDEPENDENT RESEARCH FOR
INDEPENDENT FINANCIAL ADVISERS

www.quantqualuk.co.uk

Why Partner with an Investment Research Firm?

- Are you concerned about the growing regulatory demands associated with fund research?
- Are you overwhelmed by the constant outreach from investment managers seeking your time?
- Do you struggle to find time to document meetings with fund managers and conduct thorough research?
- Would you like your clients to feel that their investments are integral to your service?
- Do you wish you could dedicate more time to building client relationships?

Introducing QuantQual

By partnering with specialist investment research providers like QuantQual, you can ensure your clients achieve optimal outcomes without the complexity and time commitment of managing investments internally. We help advisers enhance client results and streamline operations through our expert research, portfolio management, and bespoke reporting services.



Our Expertise at Your Service

Experienced Research Team: Benefit from our seasoned professionals who are constantly evaluating market trends, asset performance, and fund strategies to bring you top-tier insights.

Blended Multi-Asset Funds: Access to specialists in blending multi-asset funds to deliver diversification and improve the investment journey.

Comprehensive Solutions: We offer a range of investment options, including Growth, Income, and Discretionary portfolios, tailored to meet varying client needs.

Flagship Portfolios: For investors who prioritise diversification and risk management.

Branded Reporting: Impress your clients with branded Portfolio Factsheets, Quarterly Commentary, and Review Notes that offer clarity and transparency.





PASSION LED US HERE

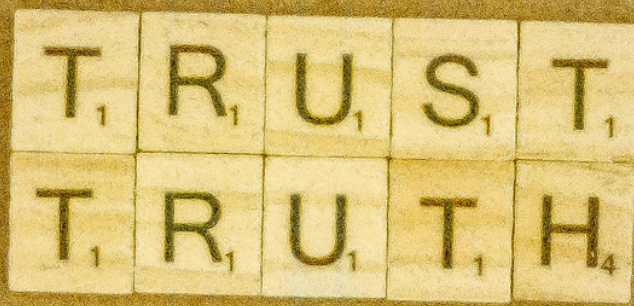
Our Services

At QuantQual, we provide outsourced investment research, due diligence, and portfolio construction designed for financial advisers. We aim to elevate your client outcomes and operational efficiency, freeing up your time to focus on relationship building and business growth.

Growth Portfolios: A range of six multi-manager growth portfolios investing across multi-asset and single-strategy funds to deliver long-term capital growth.

Income Portfolios: A selection of five income-focused portfolios designed to balance growth and regular income through diversified investments.

Discretionary Portfolios: Access to the same multi-manager strategies but with the added advantage of discretionary services via our partnership with LGIM.



Additional Services

We offer a comprehensive suite of services tailored to meet your financial needs, including:

- Investment Strategies: Guidance on buying, selling, and holding investments to optimise your client's portfolio.
- Centralised Investment and Retirement Processes: Expert assistance in developing structured investment and retirement planning approaches.
- Bespoke Portfolio Development: Customisable portfolio solutions designed to align with your business objectives and personal preferences.

Our partnership with Money Wise UK provides valuable market insights through regular written updates, keeping you informed about key financial developments.

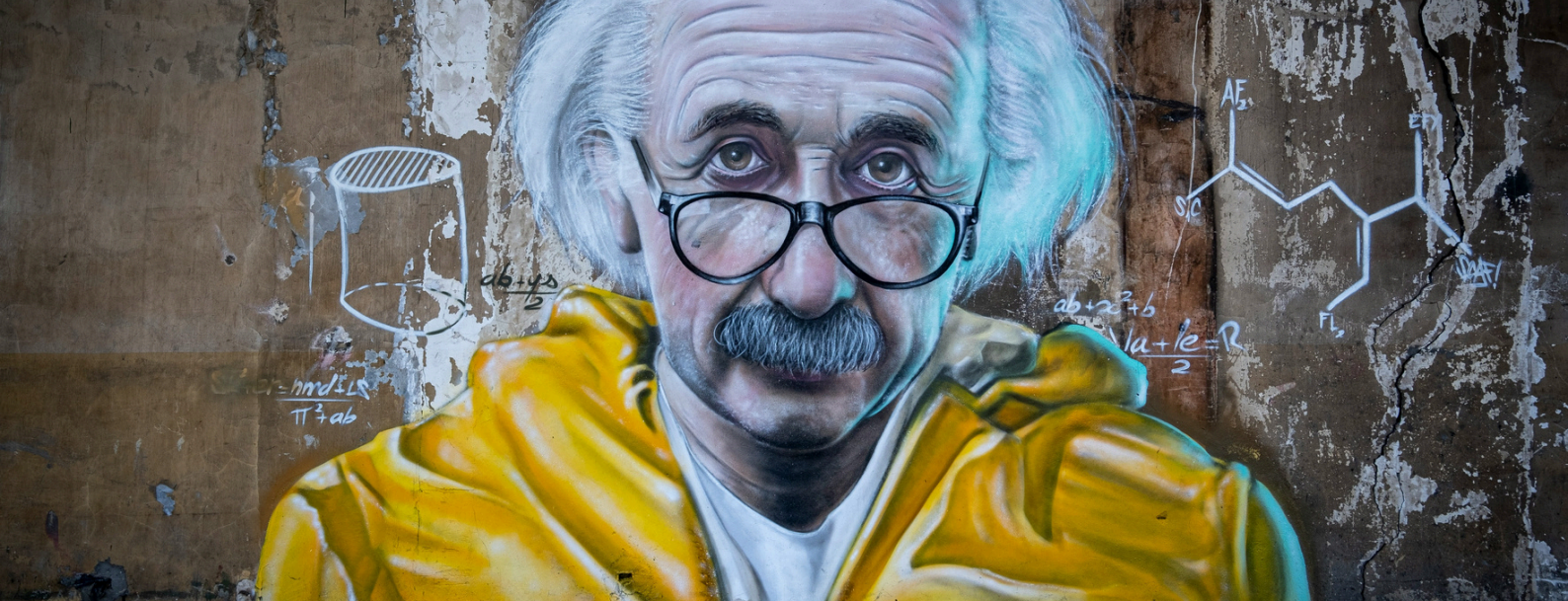


Risk Scores

We utilise a range of risk assessments to align with your client's objectives, including QuantQual, Defaqto (DT), FE, Morningstar, Vanguard, and IA/AFI. These ensure that portfolios are precisely calibrated for risk tolerance, allowing you to recommend suitable investments with confidence:

QQ	DT	FE	Morningstar	Vanguard	IA/AFI
3	3	30-45	Cautious	Lifestyle 20%	IA 0% - 35% Equity
4	4	40-55	Moderately Cautious	Lifestyle 40%	IA 20% - 60% Equity
5	5	50 – 65	Moderate	Lifestyle 60%	IA 40% - 85% Equity
6	6	60 – 75	Moderately Adventurous	Lifestyle 80%	AFI Aggressive
7	7	65 – 85	Adventurous	Lifestyle 100%	AFI Aggressive
8	8	80-100	Ultra Adventurous	Lifestyle 100%	AFI Aggressive





Why Choose QuantQual

Our outsourced investment solutions reduce your workload and improve client engagement with consistent, data-driven insights. Let us support your advisory practice by delivering high-quality research, due diligence, and portfolio strategies that drive client satisfaction and business growth.

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<https://www.quantqualuk.co.uk/>

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