

Flagship Portfolio Range

Navigating Markets, Securing Futures



INDEPENDENT RESEARCH
FOR INDEPENDENT
FINANCIAL ADVISERS



www.quantqualuk.co.uk

Why Partner with an Investment Research Firm?

- Are you concerned about navigating the growing regulatory demands around fund research?
- Do you feel overwhelmed by constant contact from investment managers vying for your time?
- Is it challenging to allocate time for documenting fund manager meetings and conducting thorough research?
- Would you like your clients to see their investments as integral to your service?
- Do you wish for more time to focus on building and maintaining client relationships?

Introducing QuantQual

Partnering with QuantQual enables you to deliver superior client outcomes without the complexity and time demands of managing investments internally. Our expertise enhances client results, streamlines your operations, and ensures you can dedicate more time to what you do best advising your clients.

We offer tailored research, portfolio management, and branded reporting solutions that simplify your investment management process while elevating your service quality.



Our Expertise at Your Service

Experienced Research Team

Gain access to seasoned investment professionals who evaluate market trends, asset performance, and fund strategies to provide cutting-edge insights.

Specialists in Multi-Asset Fund Blending

Our expertise in blending multi-asset funds ensures diversification and a smoother investment journey for your clients.

Comprehensive Investment Solutions

From Growth to Income and ESG portfolios, we provide various tailored solutions to address diverse client objectives.

Flagship Portfolios

Designed for investors who prioritise diversification and risk management while seeking long-term growth.

Branded Client Reporting

Strengthen client relationships with bespoke reports, including Portfolio Factsheets, Quarterly Commentary, and Review Notes that offer transparency and clarity.



Introducing The Flagship Portfolios

Growth Portfolios

Balanced blends of active and passive multi-asset strategies, capped at 50% indexed solutions.

- Active Alpha: Curated mix of active managers with complementary styles to address portfolio weaknesses.
- Enhanced Indexing: Asset allocation overlays for cost-effective and dynamic market exposure.

Income Portfolios

Targeting an initial 4% yield with a focus on sustainable income growth.

- Ideal for retirees, supplementary income seekers, or reinvestment strategies.
- Tax-efficient options available for General Investment Accounts (GIAs).

Pactive Portfolios

Cost-conscious solutions that maintain diversification and strategic rigour while minimising expenses.



Introducing The Flagship Portfolios

ESG Portfolios

Rigorous selection of ESG managers who prioritise meaningful environmental, social, and governance impact.

Discretionary Portfolios

Access to multi-manager strategies with discretionary services, reducing operational pressures on your business.



Our Investment Philosophy

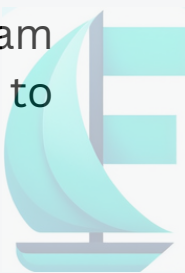
We believe in simplicity and diversification as the cornerstones of investment success. Recognising that no single strategy performs well across all market conditions, we combine complementary multi-asset strategies and fund managers.

By blending diverse styles, we create a smoother investor experience where underperformance in one area is offset by strength in another. This approach builds robust portfolios for stability and confidence, aligning with your client's goals.

Quant & Qual: The Best of Both Worlds

As our name suggests, QuantQual blends quantitative analysis with qualitative insights to provide a holistic evaluation of investment strategies:

- **Quantitative Analysis:** Highlights funds that consistently perform well relative to peers while identifying performance anomalies.
- **Qualitative Insights:** This section focuses on the fund manager's philosophy, team dynamics, and downside mitigation strategies, ensuring alignment with long-term objectives.
- **ESG Emphasis:** Prioritises managers who foster team development and demonstrate genuine commitment to environmental and social responsibility.



Risk Profile

QuantQual aligns portfolios with major risk profilers, creating solutions that balance potential capital loss with targeted growth.

Portfolio Risk Levels:

- **Growth Portfolios:** Defensive Growth (03) to Aggressive Growth (08)
- **Income Portfolios:** Defensive Income (03) to Dynamic Income (07)
- **Pactive Portfolios:** Defensive Pactive (03) to Aggressive Pactive (08)
- **ESG Portfolios:** Defensive ESG Growth (03) to Aggressive ESG Growth (08)

How to Invest

Our portfolios are available on various platforms, offering flexible access to meet your business and client needs. Contact QuantQual to discuss the best solution for you.



Why Choose QuantQual?

Our outsourced investment solutions reduce your workload, enhance client engagement, and drive growth for your advisory practice. With consistent, data-driven insights and expertly managed portfolios, we empower you to focus on delivering exceptional advice and building stronger client relationships.

Let QuantQual simplify your investment process and support your journey to success.

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