MPS SUSTAINABLE PORTFOLIO 6

February 2021

PORTFOLIO DETAILS

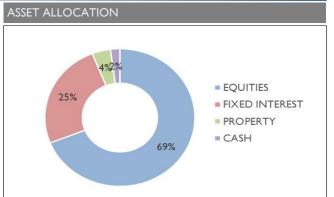
PORTFOLIO OBJECTIVE

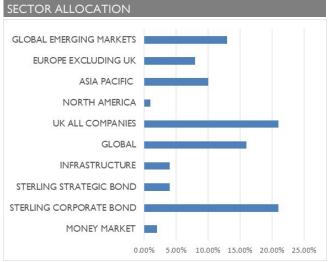
The objective of the portfolio is to seek, through a combination of capital growth and income, returns above the IA Flexible Investment Sector (although the investment constraints of this sector do not apply) by adopting an investment policy using a wide range of Assets and actively avoiding areas which could be deemed overvalued. A key characteristic of the Sustainable MPS 6 portfolio is the adoption and use of a range of funds which fall under the IBOSS Sustainable Framework.

IMPORTANT INFORMATION		
Launch Date	01 November 2020	
Current Holdings	37	
Minimum Investment	£100	
Investment Management Charge	0.25%	
Underlying Portfolio Charge	0.73%	
Transaction Cost	0.20%	
Benchmark	IA Flexible Investment	

TARGET ALLOCATION

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GLOBAL EMERGING MAR-			4%
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ADDITIONAL INFORMATION

THIRD PARTY RISK RATINGS



The underlying portfolio charge is calculated using preferred share classes—these are subject to availability and may vary slightly between platforms. Further details available upon request.

The value of an investment and the income from it can fall as well as rise and investors may get back less than they invested. Risk factors should be taken into account and understood including (but not limited to) currency movements, market risk, liquidity risk, concentration risk, lack of certainty risk, inflation risk, performance risk, local market risk and credit risk. This communication does not purport to be all-inclusive or contain all of the information which a proposed investor may require in order to make a decision as to whether to invest in the Portfolio. Nothing in this document constitutes a recommendation suitable or appropriate to a recipient's individual circumstances or otherwise constitutes a personal recommendation. This document has been issued by IBOSS Asset Management Limited which is authorised and regulated by the Financial Conduct Authority. Financial Services Register Number 697866.

IBOSS Asset Management MANAGED PORTFOLIO SERVICE

February 2021

FUND DETAILS

EY PEOPLE



Chris Metcalfe IMC

Fund Manager

Chris has earned a reputation for building and maintaining successful model portfolios and running a close team to ensure they maintain their professional high standards of delivering an exceptional service and well researched portfolios with a consistent good track record.



Chris Rush IMC

Co-Fund Manager

Chris provides critique through quantitative analysis, research and one to one manager meetings, leading to specific fund recommendations. His hands on experience and technical knowledge are intrinsic components to the decision making process.



Michael Heapy IMC

Investment Analyst

Michael assists with the analysis of the funds and the provision of relevant data and attending fund m a n a g e r meetings/seminars. As well as gaining IMC, Michael has also passed his J10 exam, which awards him the Certificate in Discretionary Investment Management.



Rebecca Anscombe

Head of Systems

Rebecca creates, coordinates and implements the development of internal systems and processes within the Investment Team. Having passed R01 and R02, Rebecca is now studying towards the IMC.

PLATFORM AVAILABILTY





FundsNetwork









THIRD PARTY RATINGS



CONTACT INFORMATION

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Phone: 01423 878840

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