www.ibossam.com
for professional financial advisers only
Data correct as of 30/06/2025

BLENDED MPS
One Solution. Double the Benefits.

The IBOSS Blended MPS is a hybrid solution for clients seeking the ideal balance between cost efficiency and active fund management, incorporating both active and passive funds. In today's fast-moving investment landscape, portfolios need to be both responsive and cost-conscious. By combining the strengths of our Core and Passive strategies, the portfolios deliver value without compromising on quality.

Portfolio	Benchmark	OCF
Portfolio 0	30% Money Market / 70% IA Mixed Investment 0-35% Shares	0.25%
Portfolio 1	IA Mixed Investment 0-35% Share	0.27%
Portfolio 2	IA Mixed Investment 20-60% Shares	0.27%
Portfolio 3	50% IA Mixed Invest 20-60% Shares / 50% IA Mixed Invest 40-85% Shares	0.28%
Portfolio 4	IA Mixed Investment 40-85% Shares	0.29%
Portfolio 5	50 % IA Mixed Investment 40-85% Shares / 50 % IA Flexible Investment	0.30%
Portfolio 6	IA Flexible Investment	0.30%
Portfolio 7	IA Flexible Investment	0.31%
Portfolio 8	IA Flexible Investment	0.33%

DFM FEE 0.17%

- Includes our white labelled client communication service at no additional cost
- Highly diversified and completely independent fund selection
- Approximately 40 to 50 funds in each portfolio *(rebalanced quarterly)*
- 8% maximum holding per fund *(active or passive)*
- Constructed using a near 50/50 split of IBOSS Core and Passive strategies
- Asset allocation aligned to Core, making risk mapping clear and consistent
- Portfolio construction cap 0.36% OCF* *(Portfolios 0–6)*
- Direct access to the Investment Team with 16+ year track record

Ideal for Clients Who Want:

- Cost-efficient portfolios with genuine active fund selection
- Risk-rated solutions designed to support long-term investment objectives
- Highly diversified portfolios that adapt to changing market conditions
- A single, hybrid solution that balances lower costs with hands-on oversight

True Hybrid Construction

Cost-Effective Active Management

Active Oversight, Tactical Agility

8+ Year Performance Track Record

Get in touch

01423 878 840

enquiries@ibossltd.co.uk

Platform Availability

7IM, abrdn, AEGON, AJBell Investcentre, AVIVA, Fundment, Fidelity International, M&G wealth, nucleus, Parmenion, Quilter, Scottish Widows, transact, wealthtime

Awards & Ratings

IBOSS has been honoured with the FTAdviser 5-Star Award in the DFM category for five consecutive years, making us the most awarded provider in this category.

Investment Team & Philosophy

All IBOSS solutions are managed by the same experienced Investment Team, with a proven track record spanning over 16 years — bringing continuity, discipline, and decades of expertise to your clients' portfolios.

The IBOSS philosophy runs through every portfolio we manage — built on true diversification, risk-adjusted returns, and strong defensive characteristics. We aim to to beat the benchmark over as many periods as possible, with less than benchmark volatility and lower drawdowns across all risk ratings.

Chris Metcalfe
CIO & MD

Chris Rush
Investment Manager

Michael Heapy
Senior Investment Analyst

Jack Roberts
Investment Analyst

Kate Townsend
Investment Analyst

Client Communication Service

- Included at no additional cost
- Clients receive branded email updates every quarter (Feb, May, Aug, Nov)
- Emails carry the advisory firm's branding and addressed from their adviser
- Content includes a market summary and portfolio-specific commentary
- Jargon-free and helps clients feel part of their investment journey
- No client action or adviser authorisation required
- Clients can leave feedback or questions directly for their adviser
- Engagement MI and subscriber data is made available each quarter

This communication is designed for professional financial advisers only and is not approved for direct marketing with individual clients. These investments are not suitable for everyone, and you should obtain expert advice from a professional financial adviser. Investments are intended to be held over a medium to long term timescale, taking into account the minimum period of time designated by the risk rating of the particular fund or portfolio, although this does not provide any guarantee that your objectives will be met. Past performance is not a reliable indicator of future performance. The value of investments and the income derived from them can fall as well as rise, and investors may get back less than they invested.

We provide the DFM MPS as both distributor and manufacturer. Details of our target market assessment can be found in our compliance investment procedures, available upon request. Each fund will be assessed independently, but it is highly unlikely that any one fund held in our portfolio will meet the target market in isolation—detail of why the inclusion collectively will be suitable is included within our research. The DFM MPS performance and displayed underlying portfolio charge is produced using the preferred share classes, this may differ from platform to platform and is shown net of fund fees only, they do not incorporate platform costs, adviser's client fee or DFM service charge.

The Blended Managed Portfolio Service (Blended MPS) was launched 30 June 2025. The past performance figures include simulated past performance to 30/06/2025 which is based on the actual performance figures/asset allocation/fund selection of the Core and Passive Managed Portfolio Service as well as their simulated performance which is based up on the Portfolio Management Service research provided by IBOSS Limited. Past performance and the simulated past performance is not a reliable indicator of future performance.

IBOSS Asset Management Limited is authorised and regulated by the Financial Conduct Authority. FCA Number 697866.
Registered Office: 2 Sceptre House, Hornbeam Square North, Harrogate, HG2 8PB. Registered in England No: 6427223.
IBOSS Asset Management Limited is owned by Kingswood Holdings Limited, incorporated in Guernsey (registered number: 42316).
IAM 198.7.25 | Approved July 2025

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