Supporting your long-term financial journey.

CAPITAL AT RISK. The value of investments can fall as well as rise, and investors may get back less than they invested.

Who we are

IBOSS offer a wide range of discretionary model portfolios available through your Professional Financial Adviser and have an impressive 17-year track record, demonstrating a disciplined long-term consistency.

One Philosophy. Designed Around You.

The IBOSS investment philosophy is built on deep diversification, disciplined risk management, proactive oversight, and independent fund selection. It is designed to deliver consistent, risk-adjusted returns with the aim for a smoother client experience, while avoiding restrictions that could hamper performance.

IBOSS' Managed Portfolio Service holds the highest 5 Star Rating from Defaqto, an independent verification recognised of our quality, reliability, and commitment to excellence.

defaqto
DFM MPS on Platform 2026
EXPERT RATED

Our story

Built on Experience

IBOSS was founded by former financial advisers who understand how challenging it can be to manage investments through changing markets.

From the beginning, the aim was simple: **to create a clear, repeatable investment process that helps clients stay invested with confidence, even during uncertain times.**

Over the years, that philosophy has remained unchanged, helping thousands of clients across the UK through multiple market cycles.

2008

Founded with a long-term focus

IBOSS was established to provide model portfolio research to financial advisers that helped support long-term financial goals.

2016

Expanding how clients can invest

IBOSS introduced its multi-asset funds, giving advisers more ways to support different client needs.

2018

More choice and flexibility via discretionary portfolios

IBOSS introduced additional investment options to give financial advisers greater choice, helping them navigate an evolving investment landscape.

Today

Trusted by advisers and clients nationwide

With five seperate model portfolio ranges and four multi-asset funds, we support financial advisers and their clients across the UK.

How we manage money

A Clear, Disciplined Approach

Markets change. Trends change. Our philosophy doesn't.

At IBOSS, our approach is designed to support long-term success while aiming for a smooth journey along the way. Markets will always rise and fall, but we believe a well-constructed portfolio should help reduce unnecessary uncertainty and keep investors focused on their long-term financial goals.

Consistent Approach

Our investment philosophy has remained consistent since 2008 and is built around a disciplined, diversified approach to portfolio construction. By spreading investments across a wide range of assets, we ensure that portfolio performance does not rely on any single investment or market outcome.

We believe this approach allows investors to pursue attractive long-term returns while reducing the impact that individual investments or short-term market downturns may have on their overall portfolio. Market fluctuations are an inevitable part of investing, but a well-diversified portfolio can help soften their effect and keep investors on track .

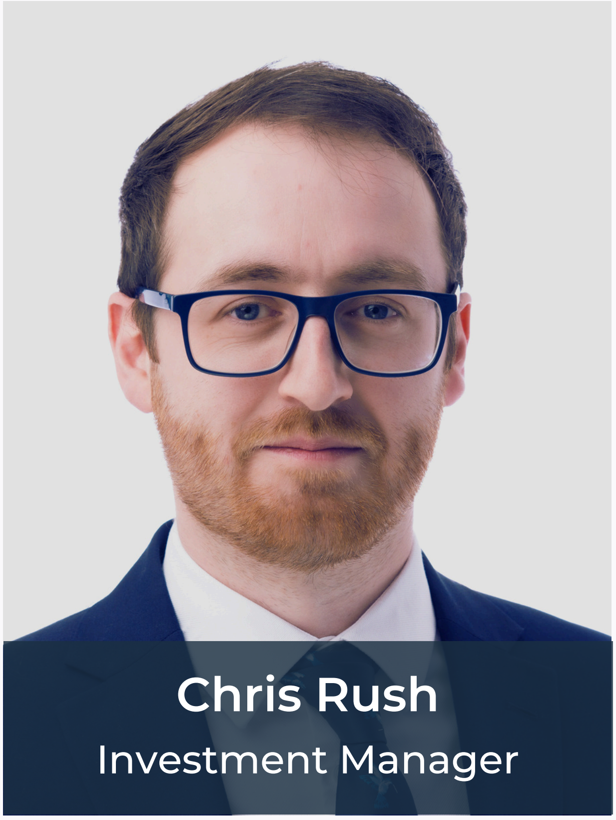
The Right Portfolio For You

All of our portfolios share similar core characteristics, with diversification being a key consideration. However, we recognise that not all investors have the same priorities or approach to risk.

For this reason, we manage a range of portfolios designed to suit different objectives and risk preferences. With 41 unique portfolios available, whether your focus is on capital growth, income, cost efficiency or ethical considerations, your adviser will work with you to identify the approach that best reflects your individual circumstances.

Our team

Chris Metcalfe
Chief Investment Officer & Managing Director



Chris Rush
Investment Manager

Experienced Oversight

Your investments are overseen by an experienced investment team led by our Chief Investment Officer, supported by a wider team of analysts and operational specialists who help ensure portfolios are carefully monitored on an ongoing basis.

Rupert Thompson
Economist

Michael Heapy
Senior Investment Analyst

Jack Roberts
Investment Analyst

Kate Townsend
Investment Analyst

Matthew Atkin
Investment Analyst Support

Ethan Hicks
Investment Analyst Support

Investment options built around you

Core MPS

Our Core portfolios look to invest across the broadest spectrum of investable assets and funds.

Passive MPS

Our Passive portfolios blend lower cost investments to deliver diversified portfolios at a lower price point than the core range.

Blended MPS

By blending the Core and Passive ranges, the Blended portfolios aim to deliver a middle ground between cost and a broader set of investment opportunities.

Decumulation MPS

Our Decumulation portfolios look to better protect investor capital whilst delivering an attractive income for investors.

Sustainable MPS

Our Sustainable portfolios aim to deliver investment returns by investing in funds that deliver superior sustainability credentials.

How Your Portfolio Is Monitored

Keeping Your Portfolio Aligned with the Market

Investment markets are constantly evolving. Whether driven by geopolitics, technological developments or central bank policy, the opportunities and risks within markets change over time.

To help ensure your portfolio remains well positioned for changing market conditions, our experienced investment team reviews each portfolio regularly and makes adjustments when necessary.

A Proven Track Record and a Trusted Team

For over 17 years, the IBOSS team has delivered consistent investment outcomes for clients. The experienced team is led by Chief Investment Officer Chris Metcalfe and supported by a team of investment professionals, analysts and economists. As an independent investment manager, the team selects funds from across the entire market, allowing them to make impartial investment decisions when building portfolios.

By managing portfolios on behalf of a large number of clients, IBOSS is also able to benefit from economies of scale, providing access to competitively priced funds and helping to keep investment costs lower for clients.

Next steps

In today's fast-changing world, investment markets can move quickly as technology, politics and global events continue to shape the economy. Our range of investment solutions is designed to help your money remain aligned with changing market conditions, with experienced professionals continuously monitoring portfolios and making informed decisions where needed to help manage risk and opportunities.

Your financial adviser plays a crucial role in understanding your personal goals and helping you work towards them, guiding you towards the investment strategy that is most appropriate for your needs and circumstances.

The value of investments and any income from them can fall as well as rise, and you may get back less than you invest. Past performance is not a reliable indicator of future results. These investments are not suitable for everyone, and you should obtain expert advice from a professional financial adviser.

Award-Winning Support for Your Adviser

IBOSS is recognised for the exceptional service we provide to financial advisers. Voted for by advisers themselves, we have achieved six consecutive Financial Times Adviser 5-Star Service Awards. Which is more than any other provider in our category.

This recognition reflects the high standards of support, communication and insight we deliver behind the scenes to help your adviser focus on you.

Independent & Industry Recognition

The IBOSS Managed Portfolio Service is 5 Star rated by Defaqto, this shows it provides one of the highest quality offerings available on the market. Our Core MPS range has also achieved the 5 Diamond Rating, meaning it offers excellent propositions relative to the peer group across charges and other fund manager features.

Additionally, the IBOSS OEIC Fund Range has been 4 Diamond Rated as a fund family.

Unlike consumer reviews, Defaqto ratings are based on facts, not opinions.

defaqto DFM MPS on Platform 2026 EXPERT RATED

defaqto DFM MPS (Platform) Family 2026 EXPERT RATED

defaqto Fund Family 2026 EXPERT RATED

Understanding Key Investment Terms

Diversification
Spreading investments across different asset types, sectors and regions so your portfolio does not rely too heavily on any one investment.

Volatility
The way investment values rise and fall over time. Higher volatility means prices can move more sharply in the short term.

Risk
The possibility that the value of your investments may fall or that returns may be lower than expected.

Returns
The growth or income your investments generate over time.

Portfolio
A careful selection of investment funds, managed together to support your financial goals.

Decumulation
A strategy designed for taking an income from your investments, often during retirement, while aiming to protect the value of your capital.

Capital Growth
An increase in the value of your original investment over time.

Income
Money paid from your investments, such as dividends or interest.

IBOSS

Important Information

This communication is designed for informational purposes only and is not intended as investment advice. These investments are not suitable for everyone, and you should obtain expert advice from a professional financial adviser. Please note that the content is based on the author's opinion at the time of writing/publish date. Our views and opinions regarding certain investment themes and topics can alter over time as the macroeconomic background changes and other industry news is made available.

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.

Past performance and simulated past performance are not a reliable indicators 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.

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IBOSS

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