



LAUNCH DATE
10/2024



SYNAPTIC RISK PROFILE
9



YIELD
This is a total return Portfolio, and any income is a by-product of the underlying holdings and will be incidental.



ONGOING CHARGES FIGURE
0.70%

AUGUST 2024

INVESTMENT OBJECTIVE

To provide capital growth.

STRATEGY RISK PROFILE AND SUITABILITY

The Portfolio will use equities to achieve its objective. The Portfolio is managed with a high-risk tolerance.

The Portfolio is suitable for investors who are looking for capital growth on a long-term basis (10 years plus), and are prepared to accept a high level of risk, but with the commensurate level of potentially high returns in the long term. However, as a result, investors should also be able to withstand a high level of volatility in the short to medium term.

MANAGEMENT

The Portfolio is managed by Beckett Asset Management's team of investment professionals: Samantha Owen, Director of BAM, and Tony Yousefian, Portfolio Manager.

As well as deciding on asset allocation, the team also manages the underlying Blenheim range of funds. These are actively managed utilising a wide investment universe, in line with their investment objectives.

BENCHMARK

Over the long term (5 years plus), the Investment Associations' (IA) Global Sector index is a suitable benchmark.

PERFORMANCE

Due to the recent launch date of the model, there is insufficient performance track record to display.

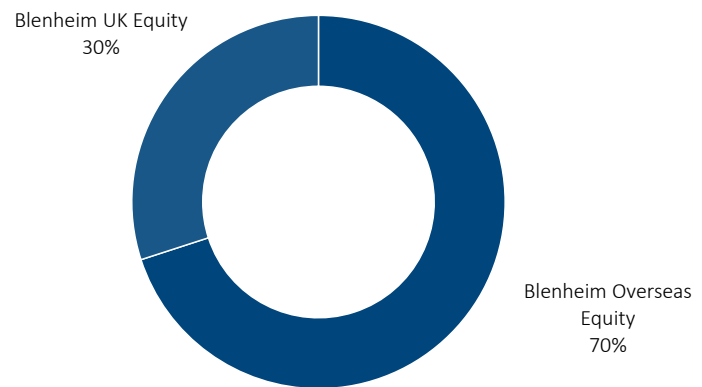
IMPORTANT INFORMATION AND RISK WARNINGS

As is the very nature of investing, there are inherent risks and the value of your investment will both rise and fall over time. Please do not assume that past performance will repeat itself and you must be comfortable in the knowledge that you may receive less than you originally invested. Changes in rates of exchange may have an adverse effect on the value, price or income of an investment. The opinions stated are those of Beckett Asset Management Ltd which is authorised and regulated by the Financial Conduct Authority.

AVAILABLE PLATFORMS



PORTFOLIO CONSTITUENTS



REGIONAL SPLIT OF EQUITY EXPOSURE

