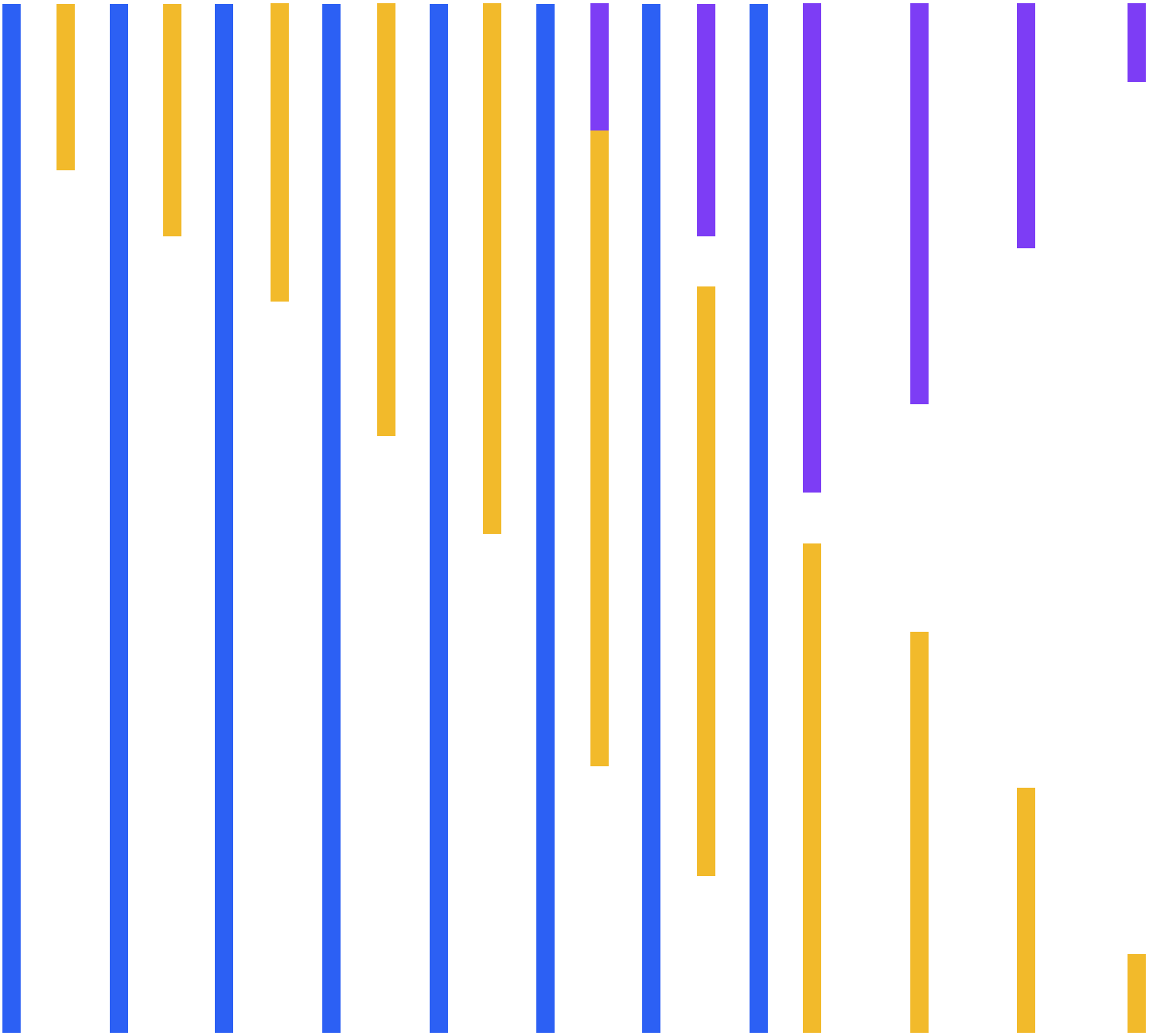
Titan Square Mile

Managed Portfolio Service
Income Portfolio



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Our Income Portfolio

The Titan Square Mile Income Portfolio offers investors an actively managed portfolio service comprised of market leading funds curated to deliver a sustainable income for investors. The aim is to generate sustainable, reliable, and consistent natural income streams for capital growth with an expected yield range of 3.5% to 4.5%.

Powered by our award-winning research and investment teams, and backed by award-winning client service, the portfolio draws from our unique Academy of Funds universe which only includes high-quality and highly rated investment options.

With one of the largest and most experienced investment research team's in the UK retail market, our independent, qualitative insights give our Managed Portfolio Service (MPS) portfolio construction a distinct competitive edge.

Our income MPS invest with a broadly diversified, blend of best-in-class multi-manager approach, deriving income from well-run cash generative businesses and a variety of fixed income assets. The aim is to achieve a sustainable income without taking unnecessary risks with your client's capital to meet your client income objectives.

At a glance



Long-term investment focus, 5 years and more



Designed to deliver a sustainable income and the opportunity for lower risk capital growth opportunities



A blend of best-in-class, high quality, rated funds



Leveraging scale and infrastructure of the Titan Wealth Group to reduce costs and enhance value for clients



A diversified income portfolio actively allocating across asset classes, sectors, and geographies

Why Consider Our Income Portfolio?

Stamp of Quality

By utilising our in-depth, in-house, quantitative and qualitative research analysis, this enables us to choose the most suitable funds for portfolios and rebalance as appropriate to continue to meet your client objectives and outcomes.

Every fund selected in our portfolios has a Titan Square Mile Academy of Funds rating, which is only awarded to those funds that meet our rigorous standards and best-in-class rating criteria. Each rated fund undergoes Titan Square Mile's thorough research process, which evaluates its ability to achieve long-term objectives and provide value-for-money for your clients.

As only a small percentage of funds pass our comprehensive, independent research to be featured on the Academy of Funds, this ensures investors can trust that the fund managers overseeing their investments are consistently held accountable.

Titan Square Mile Expertise

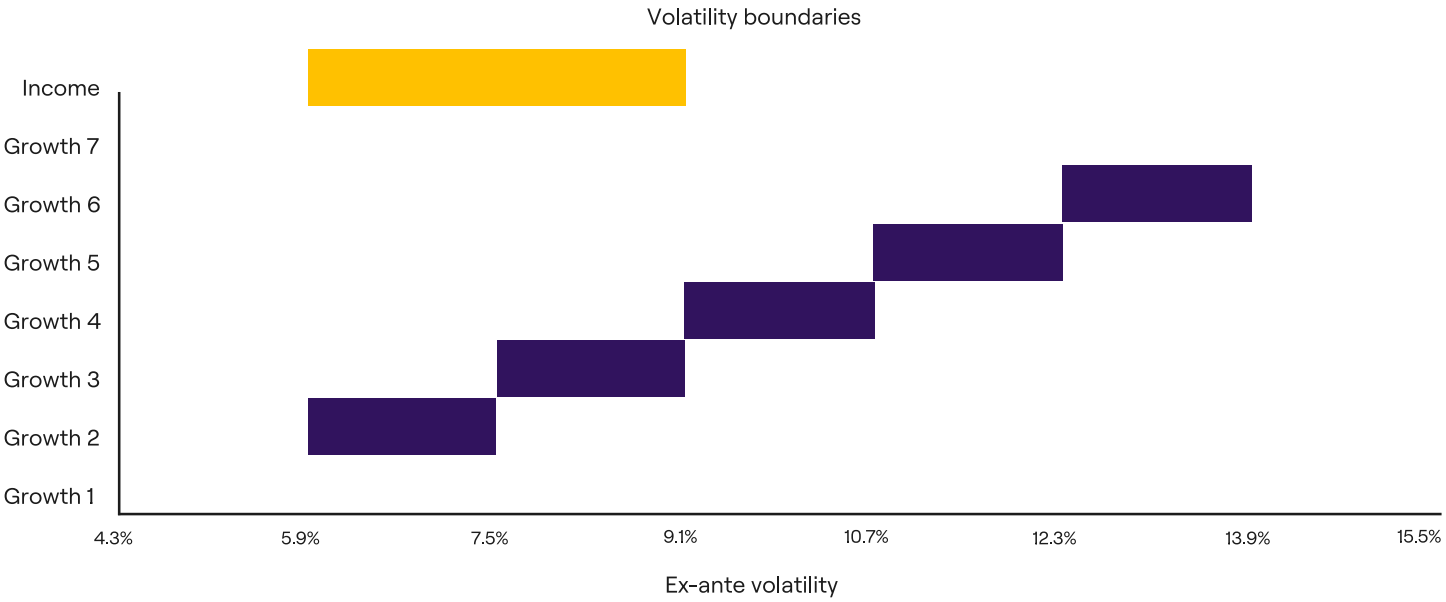
Driven by in-depth research, our portfolios are expertly managed by our experienced investment team, using the Academy of Funds universe to select the most suitable rated funds for each portfolio.

Our investment team analyse the markets, assess opportunities and risks. Together with the opinions of our research team, they identify the right funds and balance with the greatest potential to meet your clients' financial goals and outcomes. It is this collaboration and partnership in portfolio construction that gives us a distinct competitive edge and sets Titan Square Mile apart from most competitors.



Risk-Mapped And Diversified

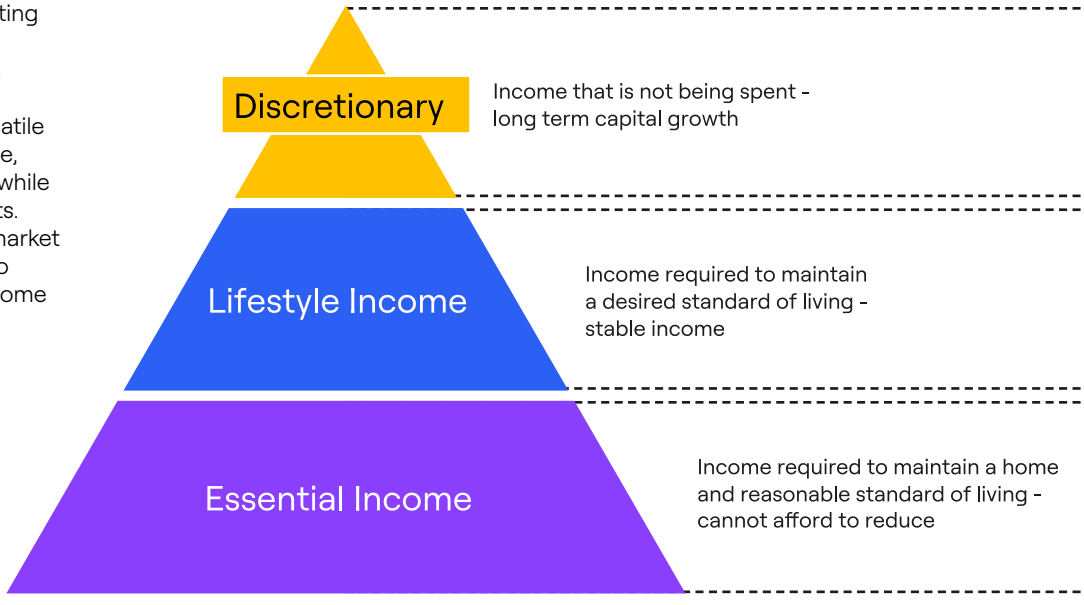
Our Income MPS aims to generate a reliable and sustainable level of annual income and the potential for appreciation of annual distribution, by being broadly diversified through a mix of equities, property, fixed income, and other income producing assets. The equity exposure is expected to range between 25% and 55% depending on the market conditions, with a volatility range of between 5.9% and 9.1% over a rolling 10-year time period.



Source: Titan Square Mile. The above is for illustrative purposes only.

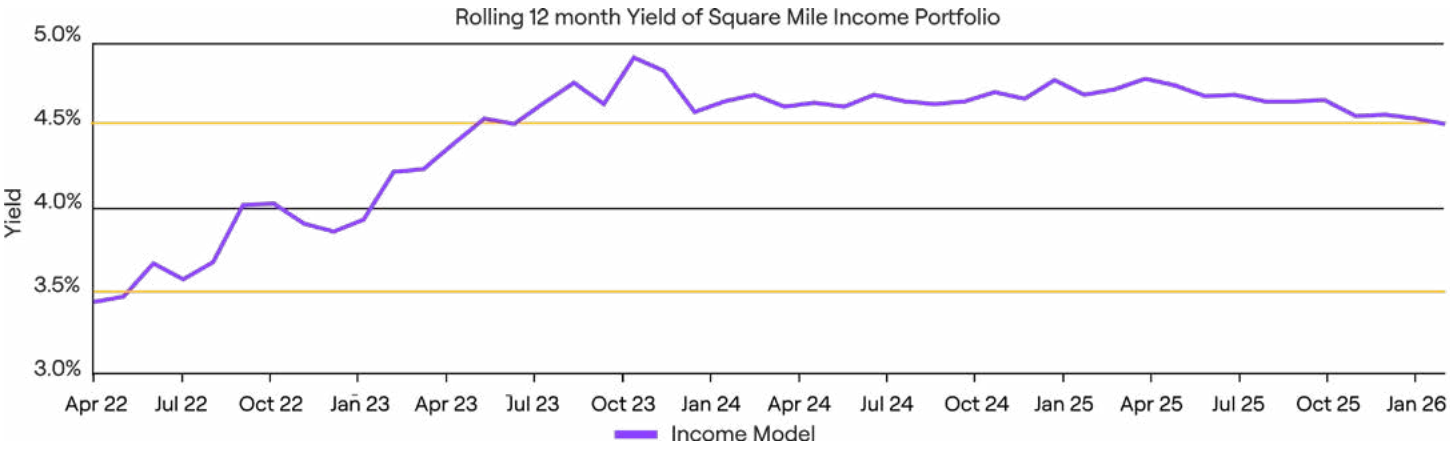
The Value Of Income Investing

Depending on client's needs, investing with an income objective can play an important role in helping clients to achieve their goals. At its core, income investing represents a versatile solution, providing a natural, reliable, and sustainable source of income while also offering diversification benefits. Furthermore, it can help manage market volatility and overall portfolio risk to support the delivery of suitable income outcomes for clients.



Sustainable Income

The precise level of yield produced will depend upon financial conditions, however it is expected target range between 3.5% and 4.5% on a rolling 12 month basis.



Source: Titan Square Mile and LSEG Lipper (all rights reserved). Data as at: 31st January 2026, net of fees, in GBP.Past performance is not a guide to future returns.

Ongoing Service

Our dedicated and award-winning client service team are happy to support your business needs and to help you service your clients. We provide you with factsheets, regular reporting, annual target market assessments, annual value-for-money assessments, and access to investment committee and market updates.

Titan Square Mile

Since 2015, our investment approach has been driven by the expertise of Titan Square Mile's award-winning teams and our unique Academy of Funds rated universe.

Through long-established, trusted relationships with the fund management community, our research team engages with hundreds of fund managers annually to gain deeper insights into fund performance across different market conditions, going beyond the data to truly understand their behaviours.

This fully integrated approach ensures that we select the most appropriate funds for our MPS, carefully tailored to each specific risk appetite, and ultimately enhancing client value and service.

For more information follow or contact us on



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Date: January 2026

TITAN SQUARE MILE