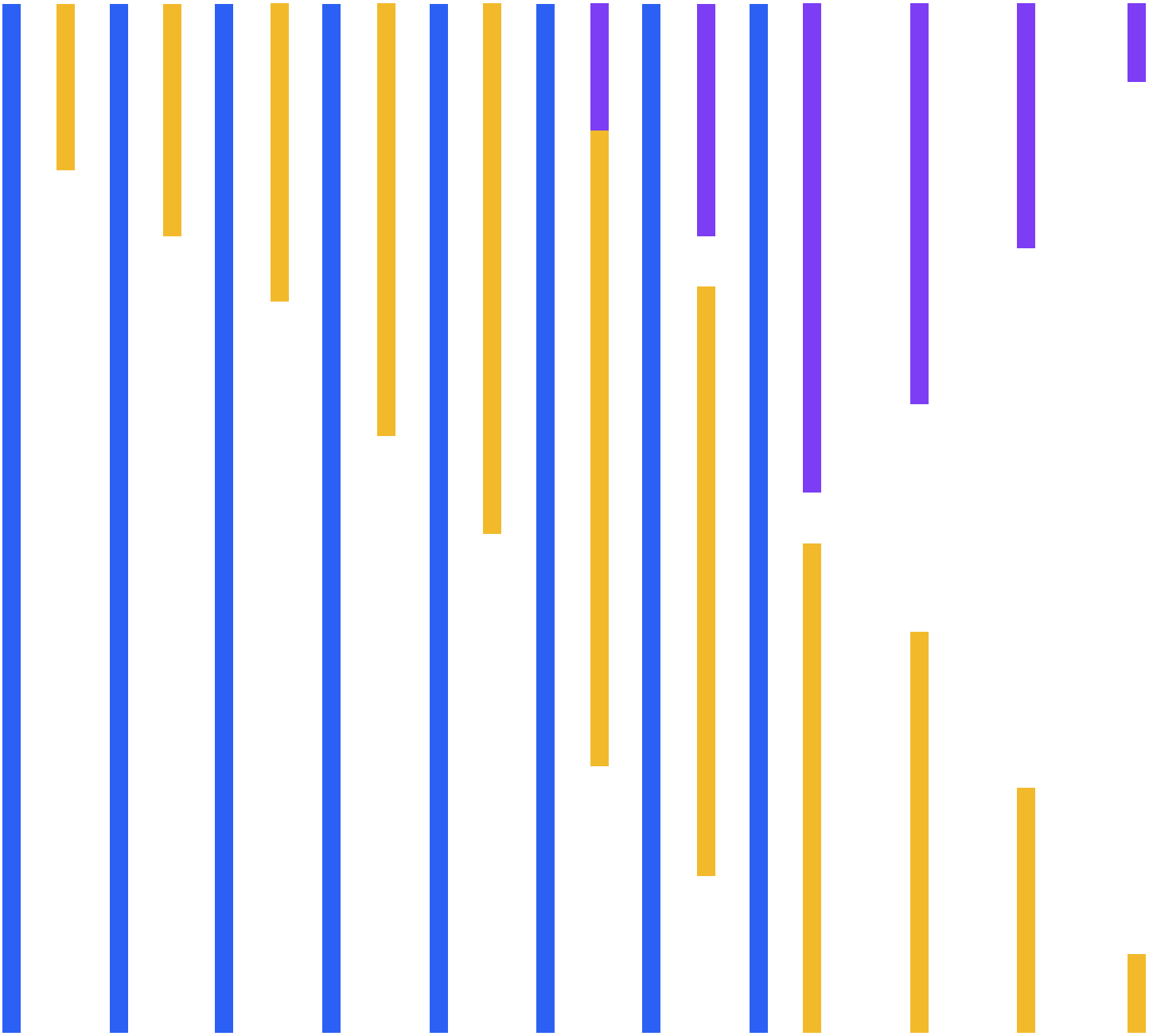
# Titan Square Mile

## Managed Portfolio Service
## Passive Portfolios




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TITAN SQUARE MILE

# Our Passive Portfolios

The Titan Square Mile Passive Portfolios provide active asset allocation through low cost Managed Portfolio Service (MPS) solutions, catering to a wide range of client risk and reward preferences.

By combining a broadly diversified, best-in-class multi-manager approach, these portfolios aim for consistent long-term performance while aligning with your clients' objectives and risk profiles.

Powered by our award-winning research and investment teams, and backed by award-winning client service, the portfolios draw 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 in the UK retail market, our independent, qualitative insights give our MPS portfolio construction a distinct competitive edge.

## At a glance



A choice of six risk profiles, designed to align and meet your clients' objectives and risk appetites



Long-term investment focus, 5 years and more



A blend of best-in-class, high quality, low-cost, passive funds



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



Actively allocating portfolios across a diverse range of asset classes, geographies, and index styles

# Why Consider Our Passive Portfolios?

## 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

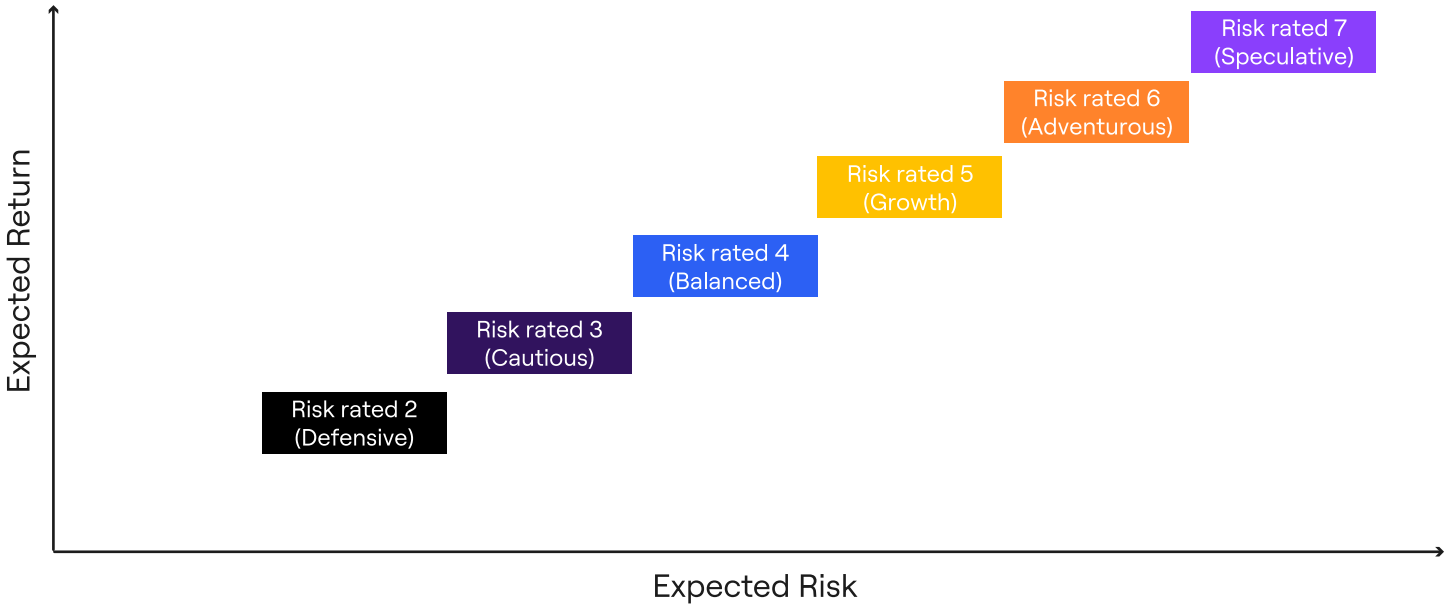
Driven by in-depth research, our portfolios are expertly managed by our experienced investment team, using the Academy of Funds universe to select the most suitable rated funds for each portfolio.

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

Depending on your clients' needs, our range offers six portfolios designed for varying degrees of risk appetite - from a lower, defensive risk profile, to a speculative one.

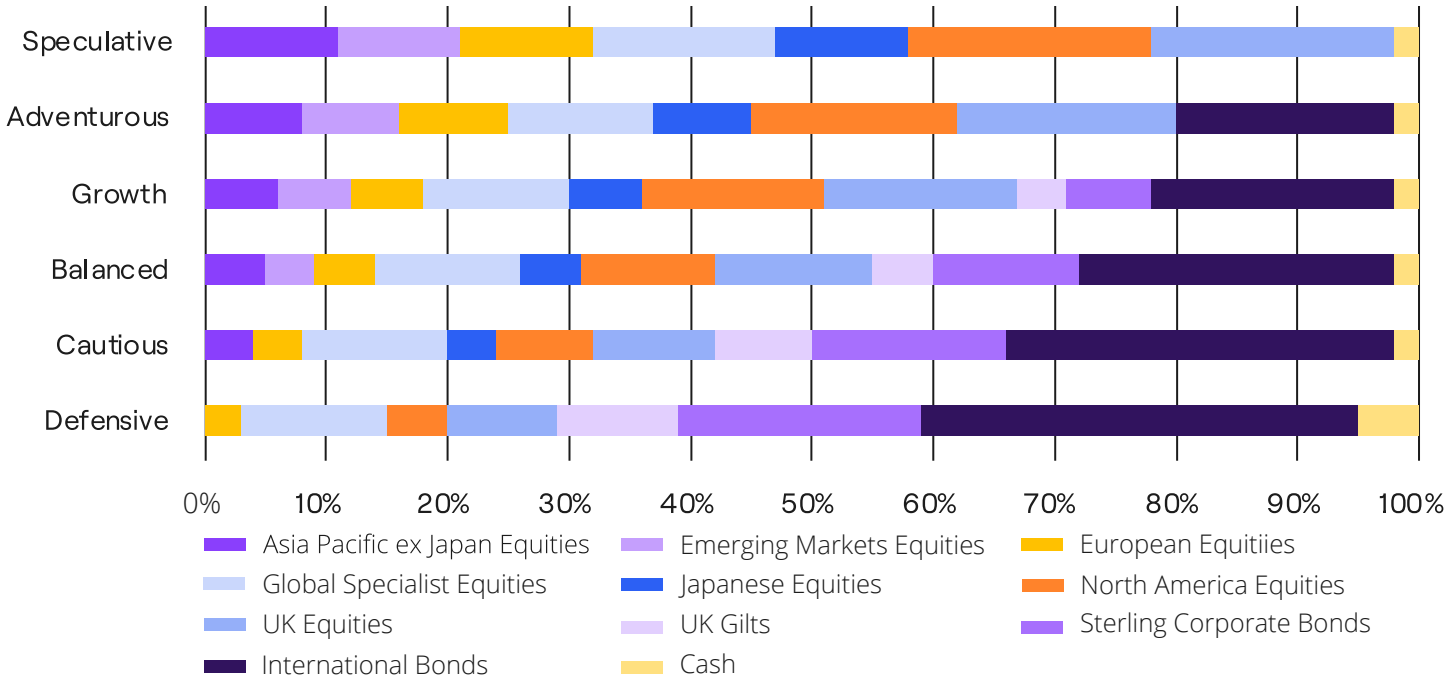



The above is for illustrative purposes and features the Titan Square Mile Passive MPS.

Diversification is crucial in passive investing. By spreading investments and exploiting opportunities across the global economy, different asset classes, geographic regions, and funds, we aim to minimise risk and maximise returns for any of our given risk profiles. As long-term investors, we leverage diversification as a key tool to achieve consistent, stable performance based on risk and return expectations.

Our portfolios are built upon Titan Square Mile's proven Strategic Asset Allocation framework, with a Tactical Asset Allocation overlay.

This approach enables us to invest across a broad range of indices, ensuring optimal diversification within each portfolio.




Source: Titan Investment Solutions. Data as at: 31st January 2026. | The above is for illustrative purposes and are subject to change.

# Cost Focused

Our scale and size allow us access to a variety of low-cost share classes to deliver better value for your clients. The range offers competitive fees with the ongoing charges figure (OCF) ranging between 0.09% to 0.10%, and the management fee is kept to a minimum at 0.15%.

# Volatility Management

Each portfolio is managed within a volatility range, over a rolling 10-year period with the aim of delivering consistent returns. This range is not guaranteed and may fluctuate outside of these boundaries.

| Defensive | Cautious | Balanced | Growth | Adventurous | Speculative |
|---|---|---|---|---|---|
| 5.9% and 7.5% | 7.5% and 9.1% | 9.1% and 10.7% | 10.7% and 12.3% | 12.3% and 13.9% | greater than 13.9% |

# 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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Source of data: Titan Investment Solutions unless otherwise stated.



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