

All portfolios pick funds.
Ours are just pickier than most.

Titan Square Mile Managed Portfolio Service

Available on
nucleus platform

TITAN Wealth

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Delivered by Titan Wealth, powered by Titan Square Mile

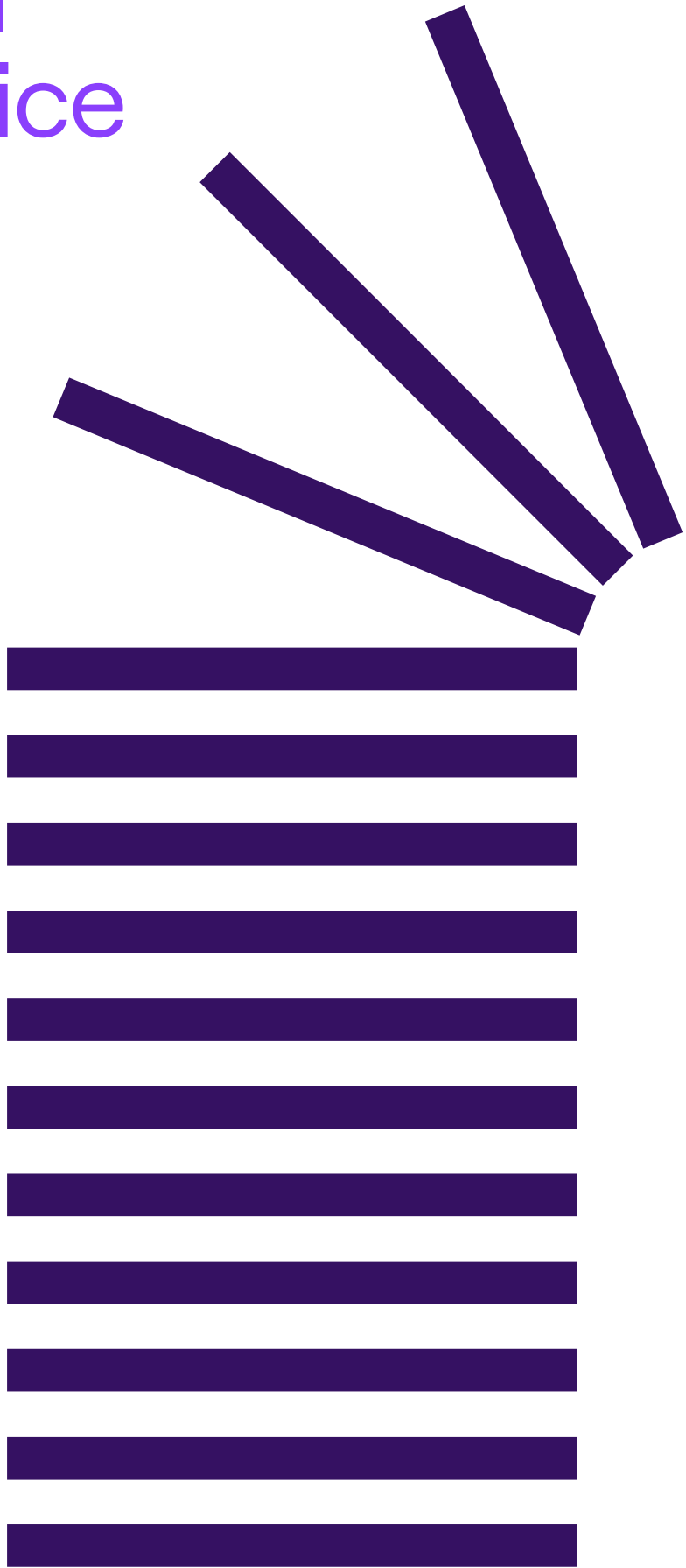
At Titan Wealth, we have built an eco-system of investment services that allows us to provide solutions to suit most clients' needs, all delivered with cost efficiency in mind.

In combination with the expertise of Titan Square Mile's award-winning research and investment teams and the unique Academy of Funds rated universe, our investment approach is driven by a focus on delivering better client outcomes.

Our fully integrated approach ensures that we select the most appropriate funds for our Managed Portfolio Service range (Titan Square Mile MPS), carefully tailored to each specific risk appetite, and ultimately enhancing client value and service.

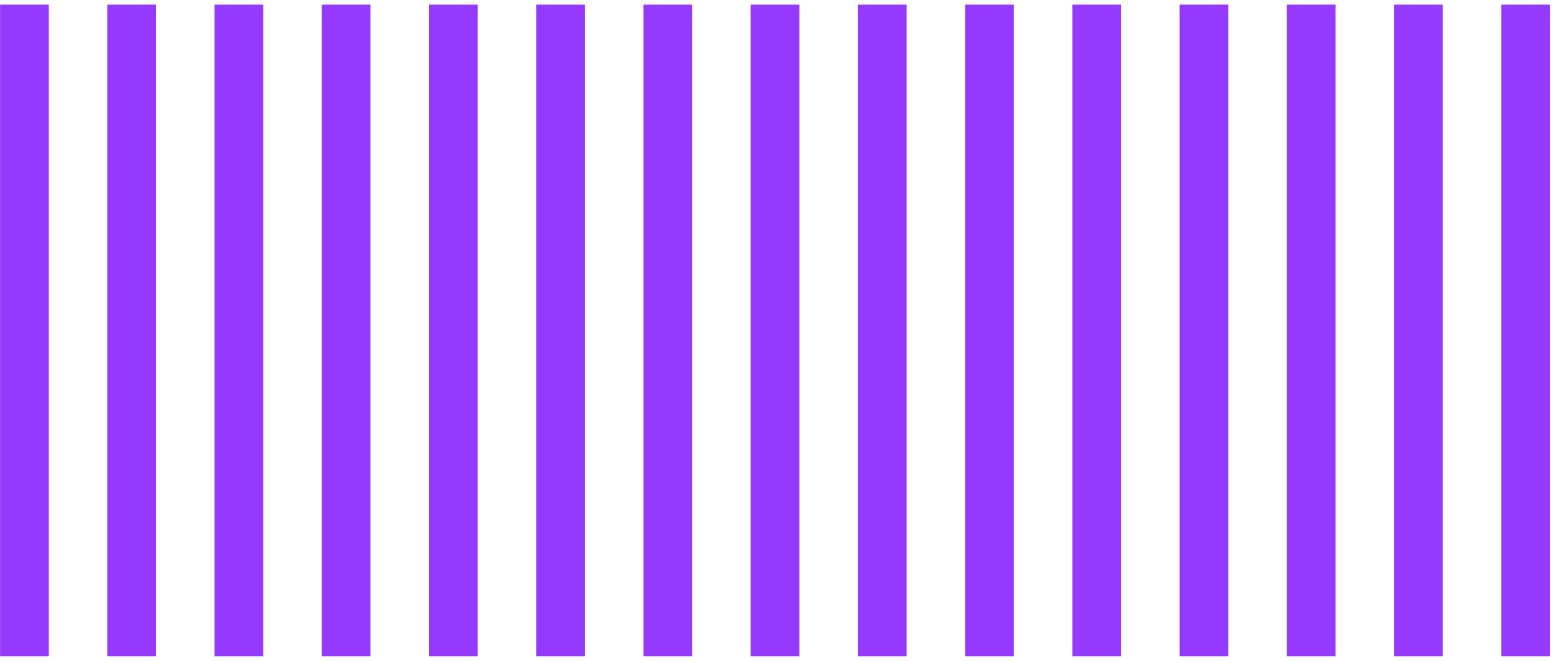
The Titan Square Mile MPS is designed to offer you, and your clients, a full range of MPS solutions to meet the aspirations, risk appetite and outcomes required, whether that be capital accumulation or preservation, income, or inflation protection.

Our Managed Portfolio Service



While the diverse nature of an adviser's role can be rewarding, at times it can be tough. Current challenges in the sector are far reaching - with increased compliance burdens, greater staffing costs, complex technology and operational restraints - all encroaching on an adviser's ability to focus on clients.

In particular, given greater regulatory pressure and the need for even more demonstrable evidence for meeting consumer outcomes, advisers have even less time for fund research whilst continuing to develop a close working relationship with a client.



The Titan Square Mile MPS is designed to take the pressure off. Each portfolio has been carefully constructed to meet the desired outcomes of clients, whilst keeping costs to a minimum with enhanced governance, oversight and support with consumer duty compliance.

By leveraging the expertise and award-winning research of the Titan Square Mile Research and investment teams, combined with the scale of Titan Wealth, the Titan Square Mile MPS offers a cost-effective investment solution tailored to clients' goals, risk preferences and expected outcomes.

At a glance

- → A comprehensive range of five MPS strategies aligned to clients' differing risk profiles and expected outcomes
- → Powered by the award-winning research and investment expertise of Titan Square Mile leveraging the scale of Titan Wealth Group
- → Actively managed, globally diversified, multi-asset portfolios, aligned to our Strategic Asset Allocation framework
- → Enhanced governance, oversight and consumer duty compliance
- → Regular reporting and dedicated service
- → Accessible via a range of market leading platforms
- → Offering better value for money

The Titan Square Mile MPS Range

Designed specifically with the aim of delivering expected outcomes, not unexpected surprises, the Titan Square Mile MPS offers a range of investment solutions and support to help you deliver the most suitable outcomes for your clients.



Our range of portfolios are actively managed, broadly diversified and designed to deliver desired outcomes over the long term. Each portfolio is driven by in-depth research and constructed to the stated mandates and risk-return profiles.



Titan Square Mile Passive

Titan Square Mile Passive MPS provides six risk-rated, low-cost, best-in-class passive solutions. By utilising the most competitive share classes available, from providers recommended by Titan Square Mile.



Titan Square Mile Blend

Titan Square Mile Blend MPS provides a low-cost, broadly diversified, blended range of investments. The five risk rated portfolios will draw on the highest conviction funds selected from the Titan Square Mile Academy of Funds universe together with the funds of award-winning Titan Investment Solutions.



Titan Square Mile Sustainable

Titan Square Mile Sustainable MPS is a range of five risk-rated portfolios which are managed to deliver dual objectives, both sustainable and financial. By investing in funds which seek to do good, avoid harm and lead change the range offers the potential for attractive long-term returns.



Titan Square Mile Active

Titan Square Mile Active MPS actively manages a blend of active and passive strategies based on market conviction, fund availability, and the size and cost of each allocation. With five risk-rated portfolios, the range is managed with aim of capital growth, over the long-term.



Titan Square Mile Income

Titan Square Mile Income MPS provides an actively managed portfolio comprised of market leading funds, aiming to deliver a sustainable annual income of between 3.5% – 4.5% without taking unnecessary risks with client's capital to meet income objectives.

	Titan Square Mile Passive	Titan Square Mile Blend	Titan Square Mile Active	Titan Square Mile Sustainable	Titan Square Mile Income
Risk profiles	6	5	5	5	1
Fund universe	Passive index funds	Active and Passive funds	Active and Passive funds	Responsible rated funds	Active Income funds
Titan Investment Solutions	No	Yes	Yes	No	Yes
Outcomes	Growth	Growth	Growth	Growth	Income and Growth
Underlying funds OCF	0.10% Capped	0.35% Capped	Uncapped	Uncapped	Uncapped
MPS Fee (Exclusive nucleus fee)	0.10%	0.10%	0.15%	0.15%	0.10%
Platform availability	Nucleus (also available on other platforms)				

Source: Titan Investment Solutions

A focus on quality, driven by Research

As the number of investment options available in the UK market continues to grow, so too does the pressure from the regulator on evidencing good consumer outcomes.

However, as fund objectives, philosophy and process vary from fund to fund, it is often difficult to really assess if a fund will achieve its stated objectives and ultimately deliver for clients, over the long term.

This is why our Titan Square Mile MPS is driven by Research. In fact, with over 3,000 funds available in the UK, only a small percentage of these pass through our robust research and selection process, offering a condensed universe of strategies which we believe have the best prospects of meeting their investment objectives over the long term.

Once a fund has passed through our research process, it is then given a rating. All rated funds can be accessed via the Academy of Funds through our interactive Funds Dashboard. With investors increasingly looking beyond performance as the only measure of success, the Fund Dashboard provides a rounded view to help you assess a fund's overall ability to meet clients' investment objectives.

The portfolios will draw on the highest conviction funds selected from the Titan Square Mile Academy of Funds universe together with the funds of award-winning Titan Investment Solutions.



Our 6-stage research process is designed to uncover those quality funds that are most likely to achieve what they set out to do.



01 Universe Assessment

Review fund for possible new inclusion into Academy of funds. Idea generation comes from:

— Quantitative screens
— Analyst coverage
— Market insights, clients, and press

02 Analyst Research

In-depth review of selected fund(s) with analysis of:

— Investment objectives
— Fund philosophy, process, and team
— Portfolio construction
— Risk management
— Value for money

03 In-Depth Qualitative Research

Face to face meetings with fund managers to validate findings.

Analyst team collaboration to discuss, challenge, and inform decision making



04 Ratings Proposal

Lead Analyst presents fund to the Ratings Committee with four possible outcomes:

— Propose a rating
— Go back with further questions
— Wait and monitor
— Decline a rating

05 Academy of Funds

On approval, the rated fund enters the Academy of Funds.

On-going assessment of all rated funds to ensure performance is in line with expectations including regular ongoing meetings with the fund managers

06 Monitoring & Re-assessment

Our opinion could change due to:

— Fund manager or team changes
— Corporate activity
— Unexpected performance
— Liquidity concerns
— New or better options presented

→ Please note Titan Investment Solutions funds are subject to the research process described above but do not form part of the Academy of Funds.

Source: Titan Investment Solutions. For Illustrative purposes only.

Our Investment Process

Putting client outcomes at the heart of everything we do

All our Titan Square Mile MPS portfolios are constructed and underpinned by our proven Strategic Asset Allocation framework, as we believe this is key to setting the long-term risk and return framework.

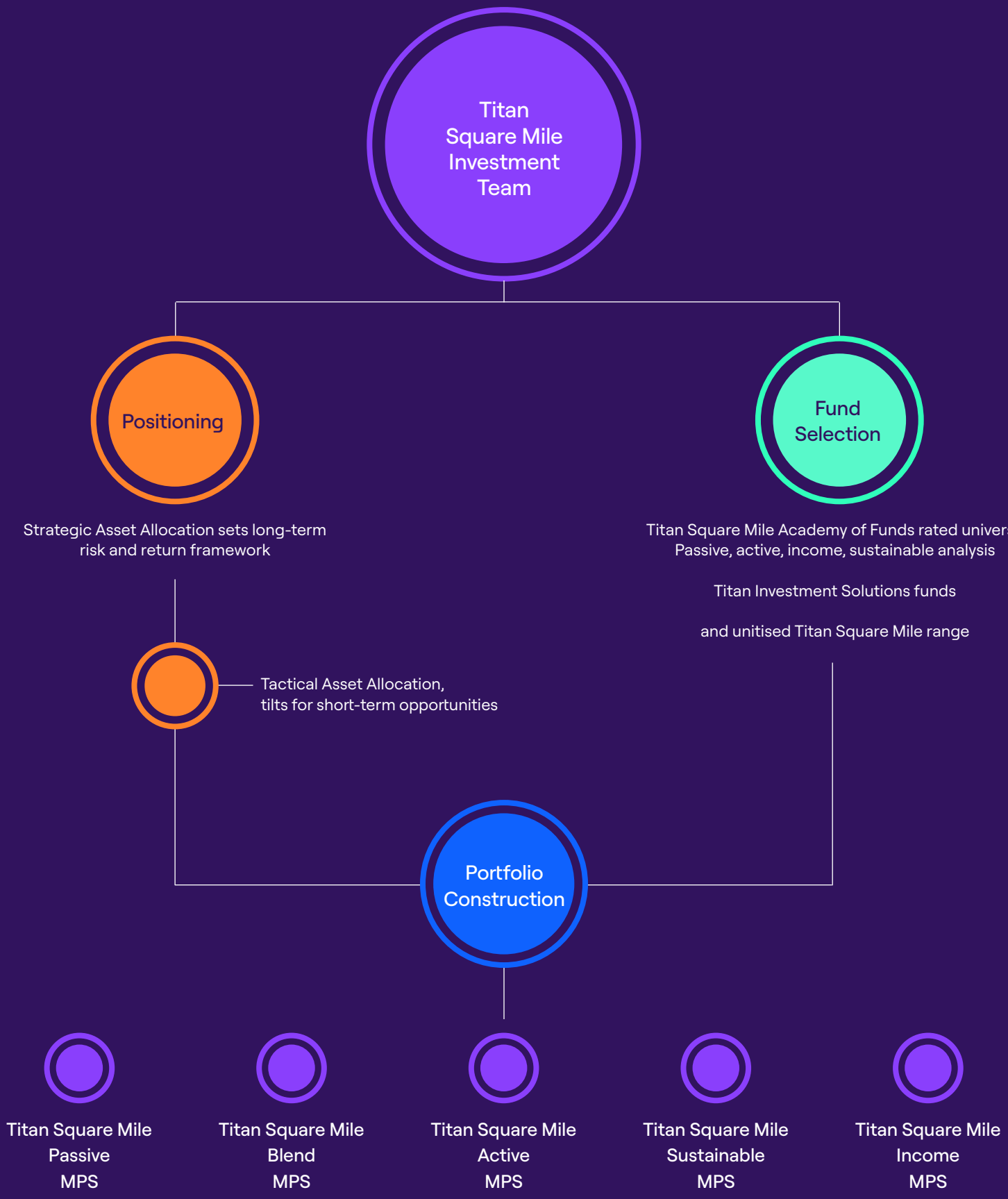
The investment team analyse the markets, assess opportunities and risks, and together with the opinions of the research team, identify the right funds and balance with the greatest potential to meet your clients' financial goals and outcomes.

Driven by deep research, our eco-system of funds, which includes all rated funds within the Academy of Funds, the funds of award-winning Titan Investment Solutions and unitised range, provides a rich source of choice on which to build our Titan Square Mile MPS portfolios.

We believe that diversification is important in delivering a spread of risk across portfolios. And by spreading investments across different asset classes and geographic regions we aim to minimise risk and maximise returns for any of our given risk profiles.

In addition, our scale and size allow us access to a variety of low-cost share classes to deliver better value for your clients. Our tried and tested investment process helps to identify the funds the team feel are most suited to meet your clients' needs and it is the quality of the funds inside the Titan Square Mile MPS that are the key drivers to delivering suitable outcomes over the long-term.

Combined with enhanced governance and oversight, our approach helps to meet the suitability and value for money requirement, supporting your regulatory responsibilities.


Titan Square Mile Investment Team
Positioning
Strategic Asset Allocation sets long-term risk and return framework
Tactical Asset Allocation, tilts for short-term opportunities
Fund Selection
Titan Square Mile Academy of Funds rated universe
Passive, active, income, sustainable analysis
Titan Investment Solutions funds
and unitised Titan Square Mile range
Portfolio Construction
Titan Square Mile Passive MPS
Titan Square Mile Blend MPS
Titan Square Mile Active MPS
Titan Square Mile Sustainable MPS
Titan Square Mile Income MPS
Ongoing monitoring and investment oversight committee to ensure compliance with risk and mandate classification

Research led, carefully crafted

With one of the largest and most experienced fund Research teams in the UK Market powering the Titan Square Mile MPS, you can be confident that your clients' investment portfolios are being managed to enhance outcomes, goals and ambitions.



→ The investment management team work in close collaboration with the Research team as we believe it is imperative that the analysts, who all have sector specialisms, are a part of the fund selection process. It is this partnership that sets us apart from competitors, with investment solutions supporting the delivery of expected outcomes and freeing you up to spend more time with your clients.

10+

Years delivering MPS solutions to the UK Advisory Market



Mark Harries
Chief Investment Officer



Scott Spencer
Investment Director



Chris Fleming
Deputy Chief Investment Officer



Florrie Lucas
Investment Management Associate



Dan Pereira
Investment Manager

20+

Investment professionals - Award-winning Investment management and Research teams

1000+

Portfolios across 21 platforms

130+

Rated funds used across portfolios

Source: Titan Investment Solutions. As of 31st March

Why work with us

Titan Square Mile, part of the Titan Wealth Group, has been providing tailored investment services for both its institutional and intermediary clients since 2014. At the core is a focus on delivering investment solutions that deliver suitable outcomes aligned to clients' needs.

Quality

- → Our partnership approach is focused on building trusted and long-term relationships, working together to deliver the expected outcomes our clients deserve
- → A comprehensive range of MPS delivered by Titan Wealth and driven by award-winning, independent research and portfolio management
- → And award-winning service to help improve efficiency and client satisfaction

Scale

- → Our scale allows us to deliver value for money investment solutions with best execution and institutional fund pricing
- → The Titan Square Mile MPS draws on the best and most suitable investments available from within Titan Investment Solutions and across the market
- → Enhanced governance, oversight and consumer duty compliance helps to reduce business regulatory and operational risk
- → Transparency of design and ease of investment proposition implementation as well as regular reporting and dedicated client service

The Titan Square Mile MPS range is specifically designed to deliver better outcomes for clients at different pricing points and risk profiles as well as reduce regulatory risk and increase efficiency within an advisers' business. To find out more about the Titan Square Mile MPS or to discuss your requirements in more detail please contact us.

Defining your investment proposition, your way

In addition to the Titan Square Mile MPS range, which is delivered on a distributor basis, Titan Square Mile continues to offer a Tailored Managed Portfolio Service on a co-manufacturing basis, to suit your business's specific suitability requirements.

A tailored service, designed for advisers

We know there is no-one-size-fits-all when it comes to investment management, which is why our Tailored MPS is truly designed for your needs. Whether you are looking for a complete managed portfolio service or simply advice and guidance on your investment process – we can help build a centralised investment proposition to support your business and meet the outcomes of your clients. Our aim is to add value to your business, providing you with solutions that meet your business objectives, aid your due diligence requirements and ultimately give you more time to spend with your clients.
Should this service be of interest, we would be delighted to partner with you to help build an investment solution, tailored to meet the outcomes, aspirations and needs of your business and your clients.

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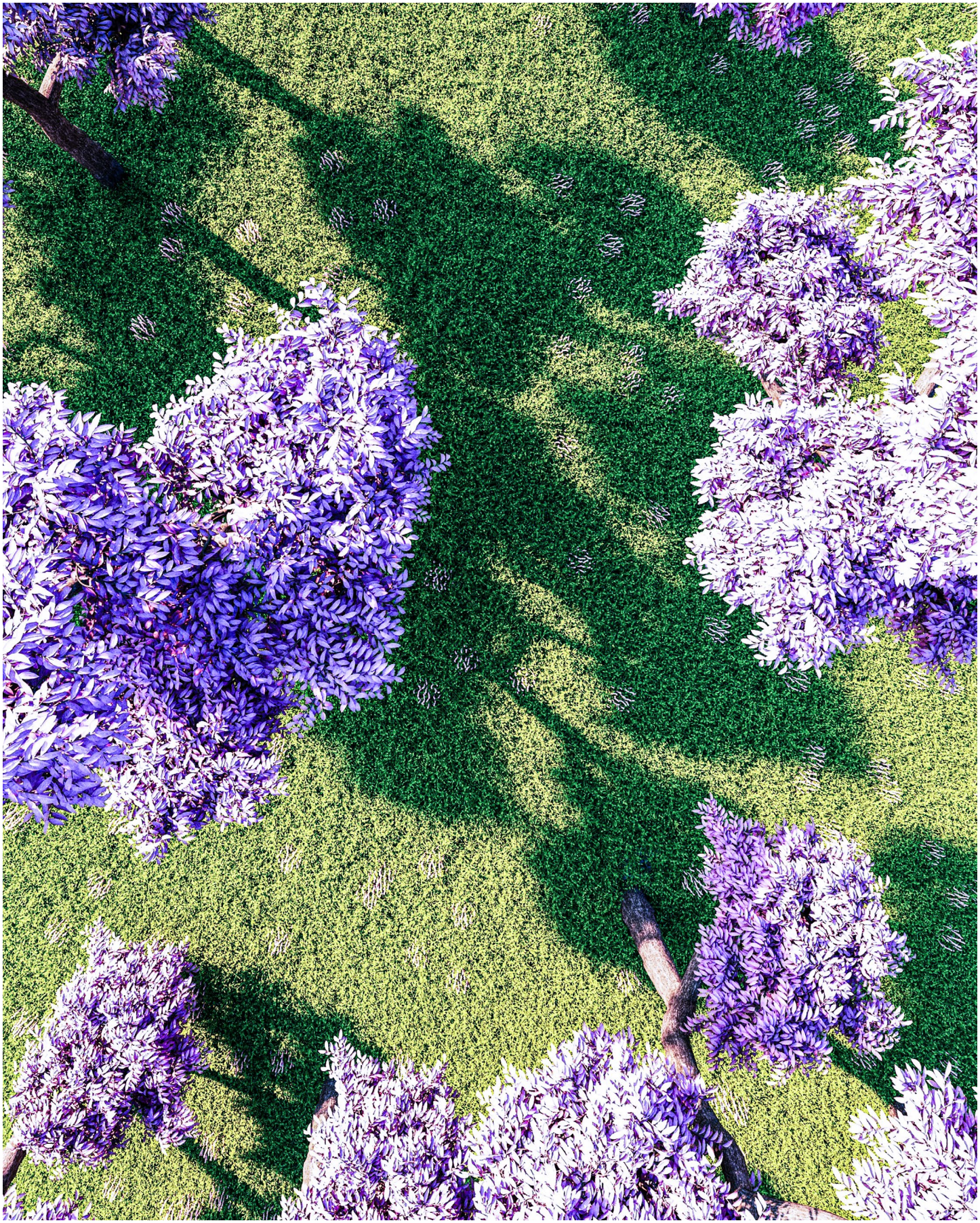
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The value of an investment may fall as well as rise. Past performance should not be seen as an indication of future performance. Any opinions expressed reflect our current judgment at the date of this document and are subject to change without notice.

Please note that all calls made to, or from, the firm are recorded in order to comply with the Firm's regulatory obligations.

Source of data: Titan Investment Solutions unless otherwise stated.

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