March 2026

TWP Active Growth

TITAN Wealth
Wealth Planning

Portfolio Objectives

Titan Square Mile aims to manage the model portfolio to an estimated volatility range between 10.7% and 12.3% p.a. over a market cycle. This is an estimation driven by capital market assumptions, and therefore not an annual guarantee as market movements may drive different outcomes in the shorter term. The Portfolio will be managed using Titan Square Mile's Growth 5 strategic asset allocation which has a 75% weight to equities. The portfolio will be predominately invested in a mix of equities but will hold a smaller allocation to fixed income and other defensive assets. The total equity exposure can range between 65% and 80%, at the time of investment. The portfolio may invest in funds managed by firms within the Titan Wealth Group. Square Mile Investment Services Limited is a wholly owned subsidiary of Titan Wealth Holdings Ltd, part of the Titan Wealth Group.

Portfolio Summary

Launch Date	10 September 2024
Platform Availability	7IM, Aberdeen, Aegon, Aegon (Arc), AJ Bell, Aviva, M&G, Morningstar International, Quilter, Titan
Yield***	1.6%

Direct Costs and Charges for Managed Portfolio Service (MPS)	
Titan Square Mile Fee	0.25%

Costs and Charges for Manufacturing and Managing the Fund (deducted from returns of fund)*	
Underlying Holding Charge**	0.64%

Commentary

Global markets started 2026 on a cautiously optimistic footing, supported by easing inflation and steady interest rates. This changed abruptly in late February when conflict in the Middle East drove a sharp rise in energy prices, reviving inflation concerns and weighing on growth expectations. Bond yields rose as investors scaled back assumptions for interest rate cuts, while credit spreads widened modestly from tight levels. Equity markets fell from early quarter highs, with defensive and energy sectors outperforming more growth oriented areas such as technology. Against this backdrop, we maintain a diversified, high quality positioning aimed at preserving resilience and supporting long term returns.

	Performance to latest month end				Calendar Year				
	3 Months	1 Year	5 Years	Since Launch	2025	2024	2023	2022	2021
Portfolio	-1.4%	11.5%	23.6%	80.7%	10.6%	10.5%	7.8%	-11.7%	9.8%
IA Mixed Investment 40-85% Shares	-1.7%	11.1%	27.1%	-	11.6%	9.0%	8.1%	-10.1%	11.2%

Performance data prior to launch date is simulated, based on a real portfolio that Titan Square Mile has run for another client with a similar mandate. Simulated past performance data is a guide only and past performance data is not a reliable indicator of future performance. Returns are net of income reinvested and investment management fees in GBP. Performance does not consider platform or adviser fees. Performance numbers are shown in discrete periods. The investment performance may vary depending upon Platform and availability of share classes. Source: Titan Square Mile & LSEG Lipper (all rights reserved).

The Investment Association (IA) is the trade body that represents the UK investment management industry. It publishes data on UK funds and investment trends and oversees fund classifications, including the widely used IA sector classifications for UK funds. The IA Mixed Investment sectors are a way they group multi-asset funds so investors can compare similar funds based mainly on how much equity a fund is allowed to hold.

*The costs and charges of manufacturing the fund will impact the overall return received by investors. Other costs deducted from fund returns are transaction costs which include trading costs, broker commissions and spreads. More information is available on request.
**Underlying Holdings Charge: Weighted average of the OCF (Ongoing Charge Figure) of all holdings. Where OCF is unavailable TER (Total Expense Ratio) is used. The actual charge may vary depending upon Platform and availability of and access to share classes.
*** Historic yield figures will only be provided for funds with at least 12 months of performance history. Where quoted, the yield is the aggregate and weighted position of each underlying fund within the portfolio and is based on the yield published by the manager of each respective fund.

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Portfolio Composition %

16% IFSL Titan Square Mile UK Equity Fund

- 3.2% Artemis Income
- 3.2% Fidelity Index UK
- 1.6% Fidelity Special Situations
- 2.4% ISFL Evenlode Income
- 1.6% JPM UK Equity Plus
- 2.4% Jupiter UK Dynamic
- 1.6% Man GLG Undervalued Assets

8% IFSL Titan Square Mile International Fixed Interest

- 1.2% AEGON Strategic Bond
- 1.12% Artemis Strategic Bond
- 1.6% Invesco Tactical Bond (UK)
- 0.8% Janus Henderson Strategic Bond
- 1.6% JPM Global Bond Opps
- 0.48% M&G Emerging Market Bond
- 1.2% Schroder Strategic Credit

7% IFSL Titan Square Mile Alternative Strategies Fund

- 1.75% Janus Henderson Absolute Return
- 1.05% JPM Global Equity Absolute Alpha
- 1.05% Jupiter Strategic Absolute Return Bond
- 1.05% MAN ASIA Pacific Equity Alternative
- 1.05% MI TwentyFour Monument Bond
- 1.05% WS Ruffer Diversified Return

6% IFSL Titan Square Mile Emerging Markets Eq

- 0.9% Artemis SmartGARP Global Emerging Markets
- 0.9% Fidelity Emerging Markets
- 1.2% Fidelity Index Global Emerging Markets
- 0.9% Invesco Global Emerging Markets
- 1.2% JPM Emerging Markets Income
- 0.9% Redwheel Emerging Markets

6% IFSL Titan Square Mile Asia Ex Japan Eq

- 1.2% Federated Hermes Asia ex-Japan Equity
- 0.9% Fidelity Asia Pacific Opps
- 1.2% Jupiter Asian Income
- 1.2% MAN Asia (Ex Japan)
- 1.5% Schroder Asia Alpha

6% IFSL Titan Square Mile Europe Ex UK Equities

- 1.2% Artemis Smart Garp European Equity
- 1.2% BlackRock European Dynamic
- 1.2% Fidelity European
- 1.2% Fidelity Index Europe ex UK
- 1.2% Jupiter European

6% IFSL Titan Square Mile Japan Equity

- 1.2% Fidelity Japan Index
- 1.2% Janus Henderson Japan Opportunities
- 1.2% JPM Japan
- 1.2% Jupiter Japan Select
- 1.2% MAN Japan Core Alpha

2% IFSL Titan Square Mile Global Equities Fund

- 0.3% Artemis Global Income
- 0.4% Fidelity Index World
- 0.4% Guinness Global Equity Income Fund
- 0.2% Janus Henderson Global Small cap
- 0.2% Jupiter Global Unconstrained
- 0.5% Schroder Global Equity

11% Fidelity Index US

8% IFSL Titan Absolute Return Fund

7% IFSL Titan Global Equity Fund

5% Titan Hybrid Capital Bond

4% Artemis US Smaller Companies Fund

3% IFSL Titan Global Blue Chip Fund

3% Titan Core Credit

2% Platform Cash

Percentage figures above may include rounding

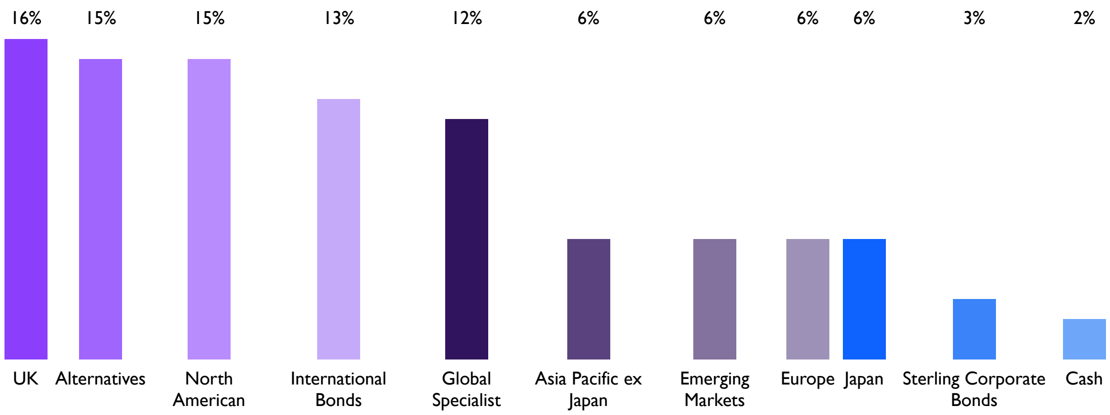
Portfolio Breakdown

67% Equity

16% Fixed Interest

15% Alternatives

2% Cash



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