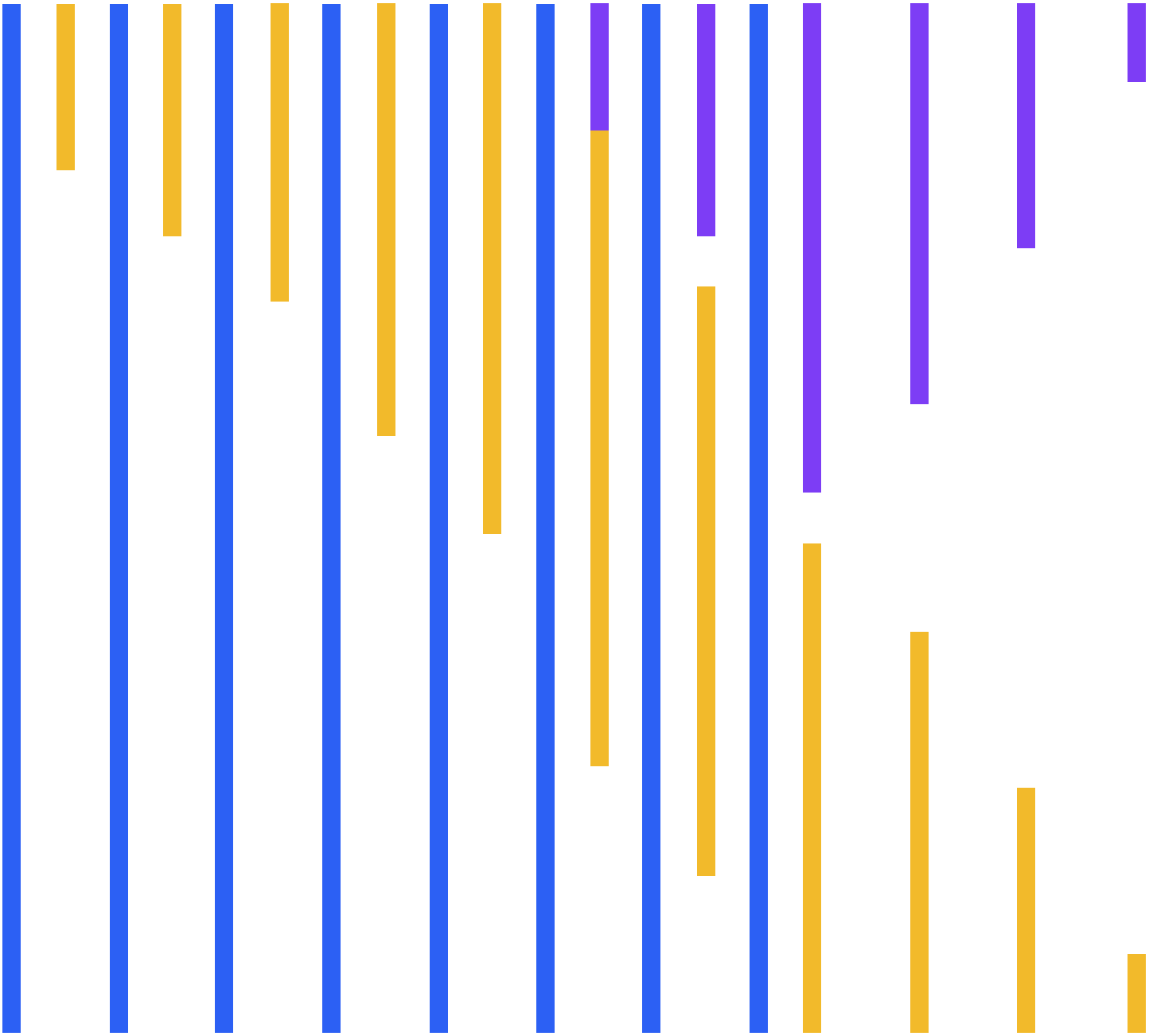
Titan Square Mile

Managed Portfolio Service
Sustainable Portfolios





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TITAN SQUARE MILE

Our Sustainable Range

The Titan Square Mile Sustainable Portfolios provide active asset allocation through a multi-asset Managed Portfolio Service (MPS) solution, catering to a wide range of client risk appetites while maintaining a keen socio-enviromental focus on the investable universe.

By combining a broadly diversified, best-in-class multi-manager approach, these portfolios strive 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 teams in the UK retail market, our independent, qualitative insights give our MPS portfolio construction a distinct competitive edge

At a glance



A choice of five risk profiles to suit a range of clients' objectives and risk appetites



Long-term investment focus, 5 years and more



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



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



Actively allocated portfolios, investing in funds which seek to do good, avoid harm, and lead change

Sustainable Assessment

Sustainable Portfolios are managed to deliver dual objectives - both sustainable and financial. At Titan Square Mile, we combine our in-depth quantitative and qualitative analysis with an evidence-based assessment using our proprietary 3D framework when evaluating responsible funds. We see Responsible Investing (RI) as an umbrella term which is underpinned by the 3D pillars of "Do Good", "Avoid Harm" and "Lead Change".

We believe that our framework will support investors and advisers in making informed investment decisions by providing a useful representation of how a fund fares from a responsible investing perspective.

These are areas which we believe are critical to affecting positive change in relation to the world's most pressing environmental and social challenges.

→ Do Good

Investment in companies offering solutions to global social and environmental challenges and evidence of impact.

→ Avoid Harm

Avoidance of investment in companies making a significant negative contribution to society and the environment and those exposed to controversies.

→ Lead Change

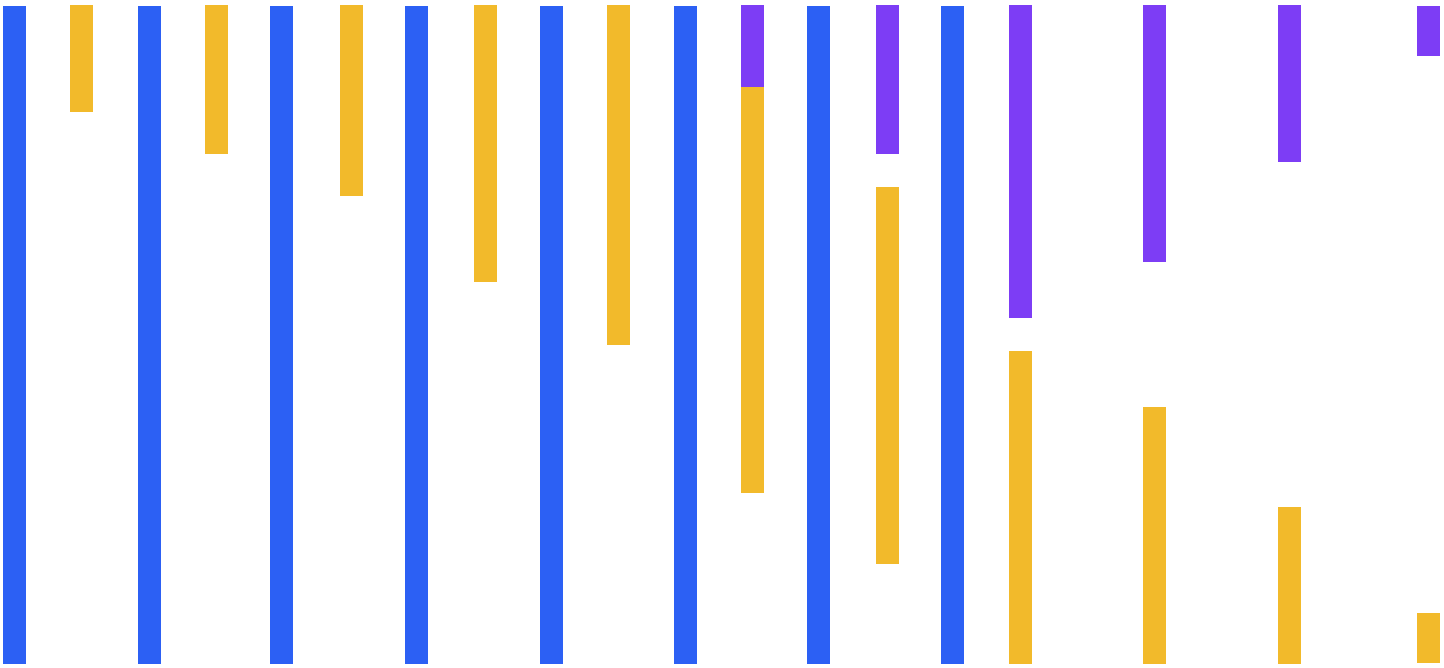
Through collaborative engagement, fund managers will seek to improve the practices and sustainability of the activities of the companies held within their funds.

What this means

Our portfolios will invest in funds which align with or actively contribute to positive solutions as described below.

It is expected that all funds in the portfolio will minimise exposure to harmful impact and controversial revenue activities to the greatest extent possible.

Engagement can take time, but we assess the positive actions managers take to effect positive change through measurable and structured engagement.



Solutions Aligned To 'Do Good'



Circular Economy:
Waste management and recycling, environmental consultancy, etc.



Education & Training:
Educational publishing education establishments, training, etc.



Healthcare:
Medical equipment, pharmaceuticals, healthcare services, etc.



Inclusive & Ethical Finance:
Microfinance, sustainable investing, peer to peer lending, general-purpose labeled bonds, etc.



Low Carbon Transport:
Train & tram operators, bus & coach operators, bicycle manufacturers, electric vehicle manufacturers, etc.



Natural Capital:
Water supply & sanitation, water filtration, air filtration, forests, etc.



Renewable Energy:
Solar, wind, hydro, etc.



Resource Efficiency:
Energy efficiency, natural resource efficiency, waste management and recycling, etc



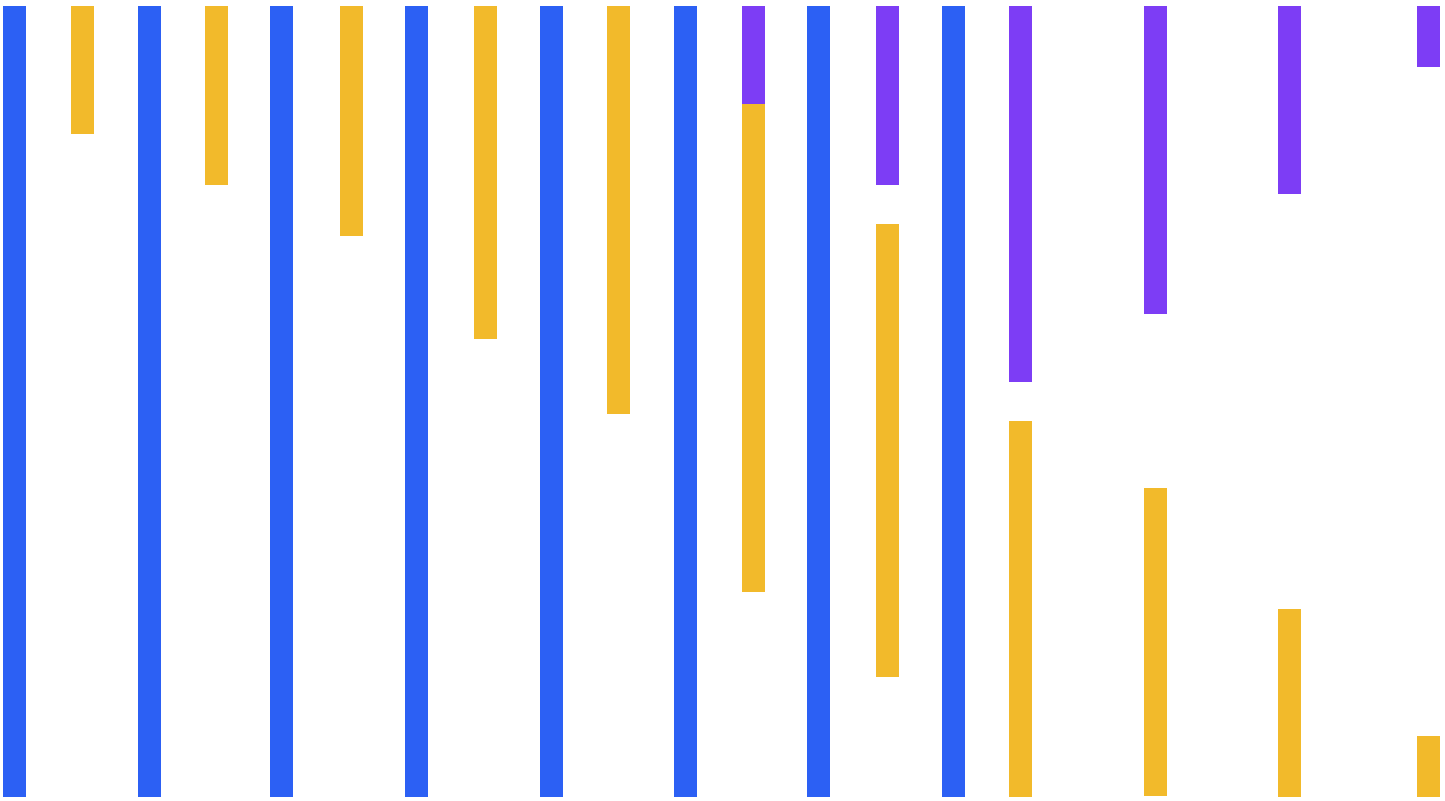
Safety & Security:
Cyber security, building and automotive safety, food safety, etc.



Social Infrastructure:
Social housing, emerging markets telecommunications, hospitals, etc.



Sustainable Food:
Food storage, reduction in non-renewable inputs for farming, renewable farming alternatives, high welfare food manufacturers, etc.



Why Consider Our Sustainable 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 responsible funds that meet our rigorous standards and best-in-class rating criteria. We further assess the funds against four broad categories: ethical exclusions, responsible practices, sustainable solutions, impact investing.

In addition, the portfolios are assessed via our unique 3D framework, which is a distinct but complementary assessment, enabling funds to be compared in a systematic and objective manner. These assessments allow investors to make informed investment decisions and avoid green washing, aligning their sustainable choices, with how their savings are invested.

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

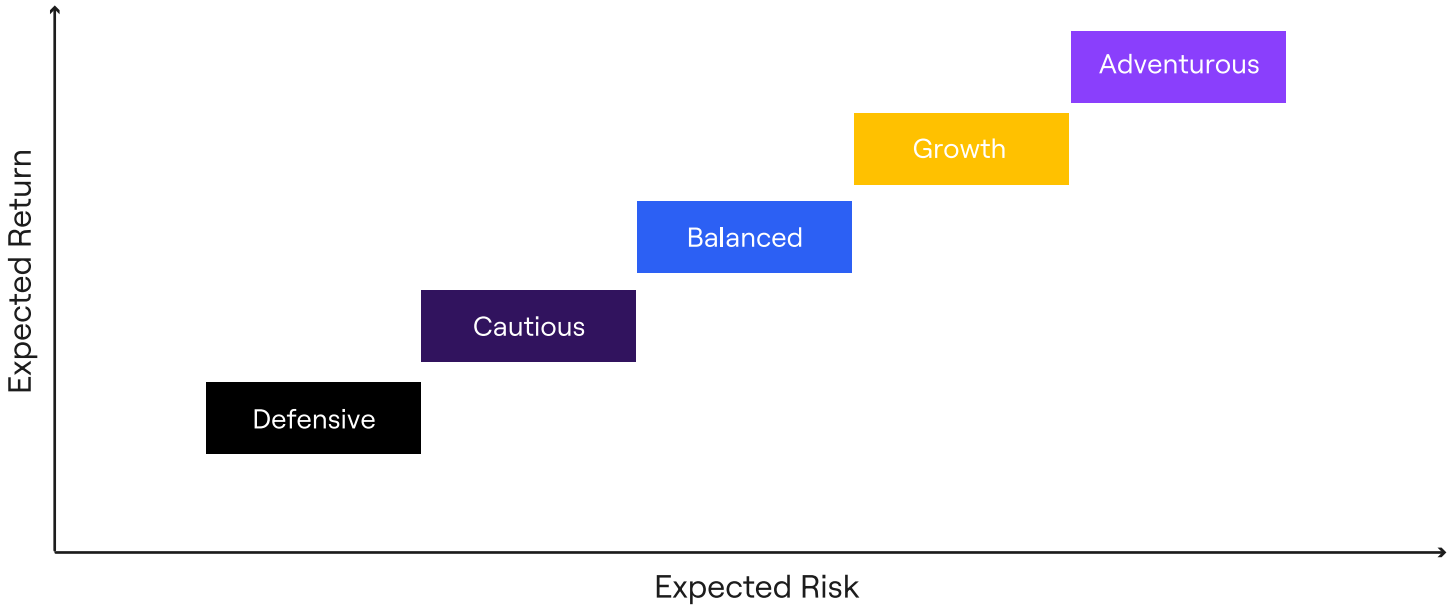
Driven by in-depth research, our portfolios are expertly managed by our experienced investment team, using the Academy of Funds universe to select the most suitable rated funds for each portfolio.

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

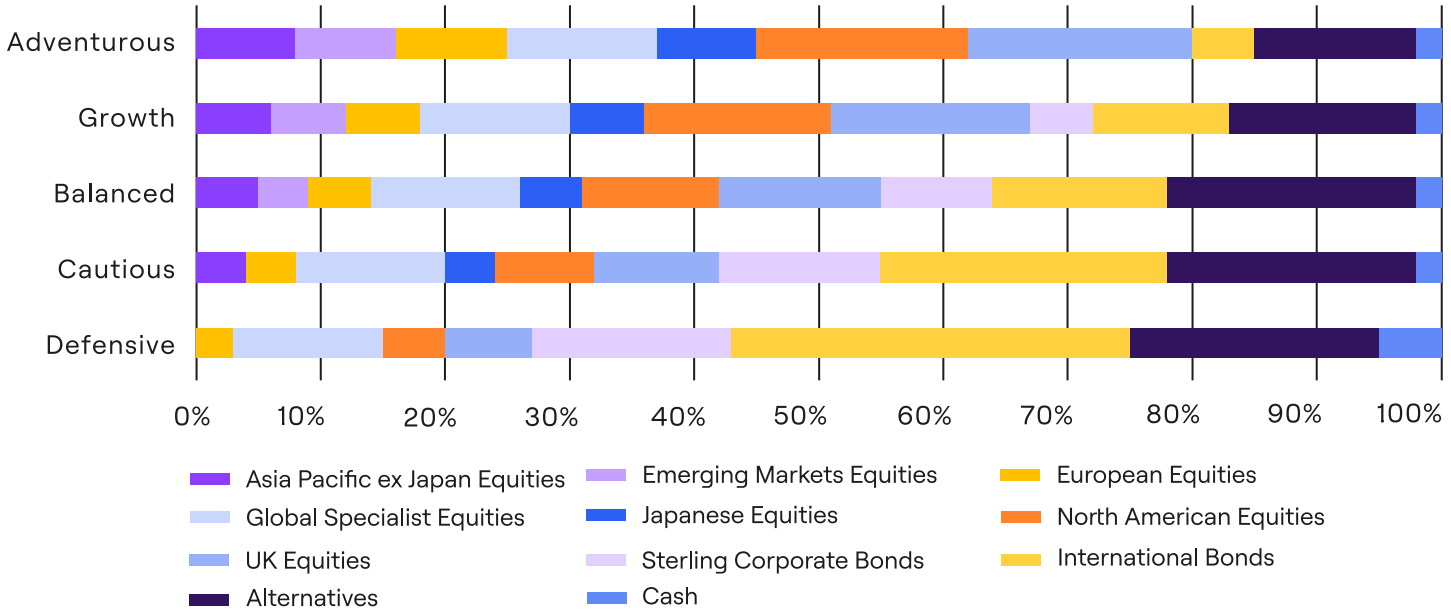
Depending on your client's needs, our range offers five portfolios, designed for varying degrees of risk and return, from defensive to adventurous.



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

Diversification is crucial in providing resilience and long-term performance for investors looking to do good with their money. By spreading investments across different asset classes, geographic regions, and funds, we aim to minimise risk and maximise returns for any of our given risk profiles.

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 funds, ensuring optimal diversification within each portfolio.



Source: Titan Square Mile. 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 0.53% to 0.64% and the management fee kept at a minimum of 0.21%.

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

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