



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

# Titan Square Mile Managed Portfolio Service



---

# Contents

---

3	Introduction
4	Our Managed Portfolio Service
6	The Titan Square Mile MPS Range
8	Research driven
10	Investment Process
12	Investment Team
14	Why work with us

---



---

# 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.

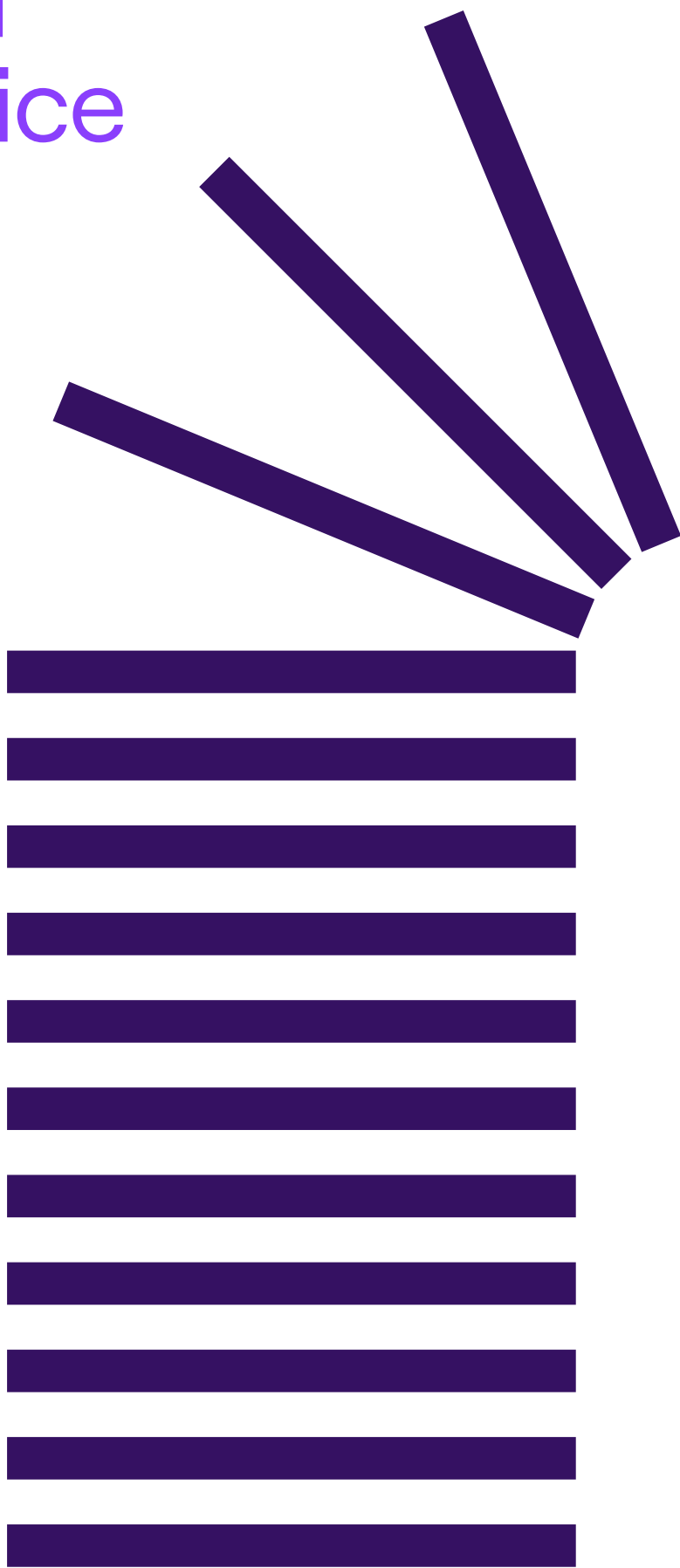
Our fully integrated approach ensures that we select the most appropriate funds for our Managed Portfolio Service range (Titan Square Mile MPS), carefully tailored to each specific risk appetite, and ultimately enhancing client value and service.

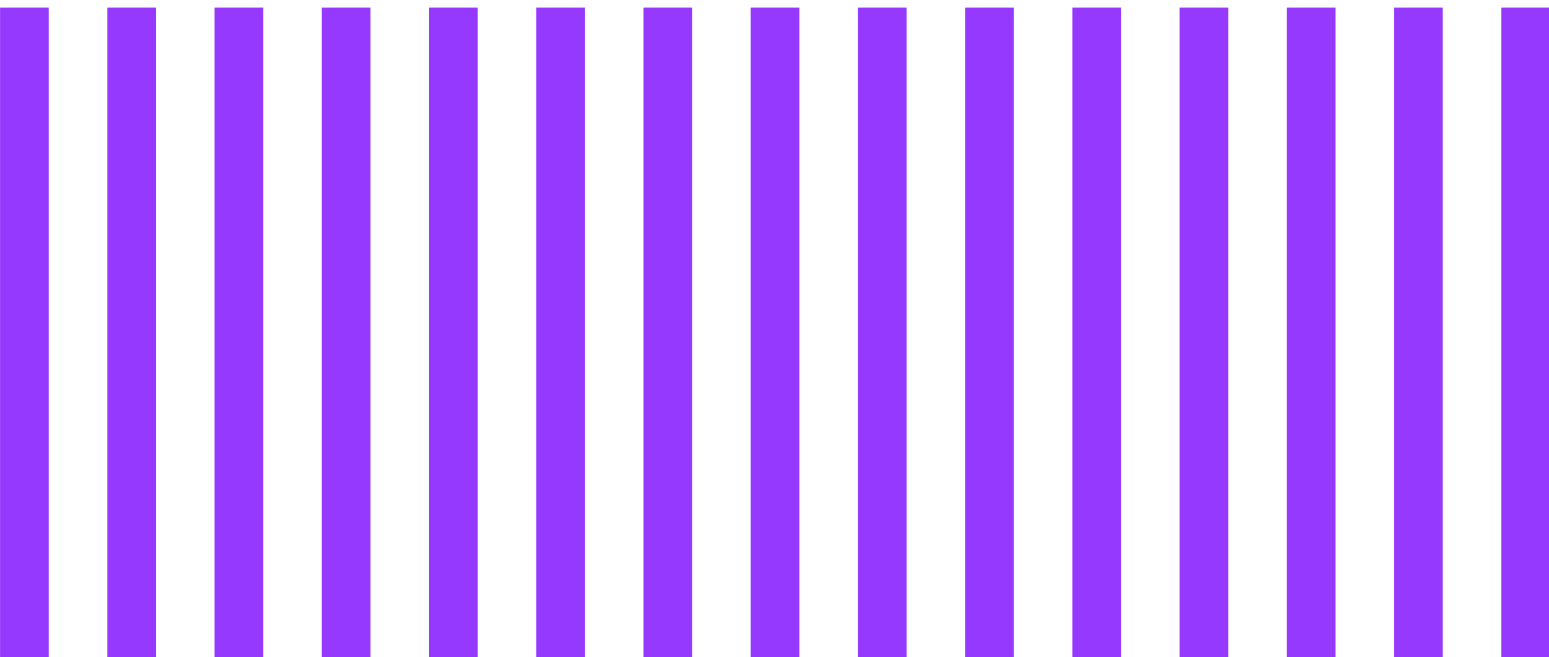
The Titan Square Mile MPS is designed to offer you, and your clients, a full range of MPS solutions to meet the aspirations, risk appetite and outcomes required, whether that be capital accumulation or preservation, income, or inflation protection.

# 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	0.15%	0.20%	0.20%	0.20%	0.20%
Platform availability	Aberdeen Wrap, Aegon Retirement Choices (ARC), Aviva, Fidelity, Nucleus, Quilter, Transact				

# A focus on quality, driven by Research

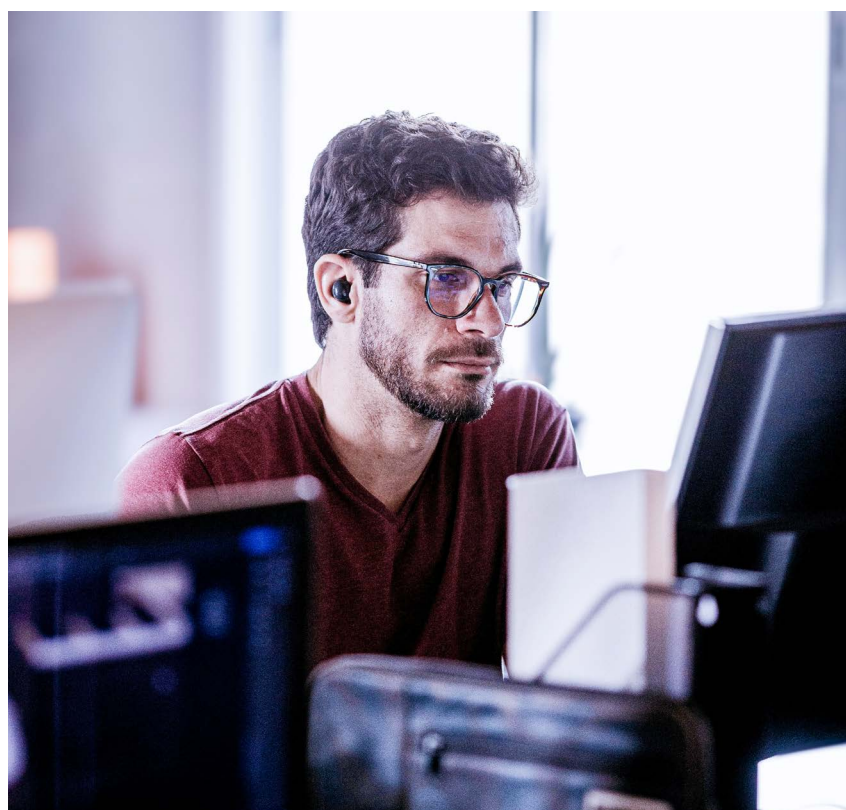
As the number of investment options available in the UK market continues to grow, so too does the pressure from the regulator on evidencing good consumer outcomes.

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.

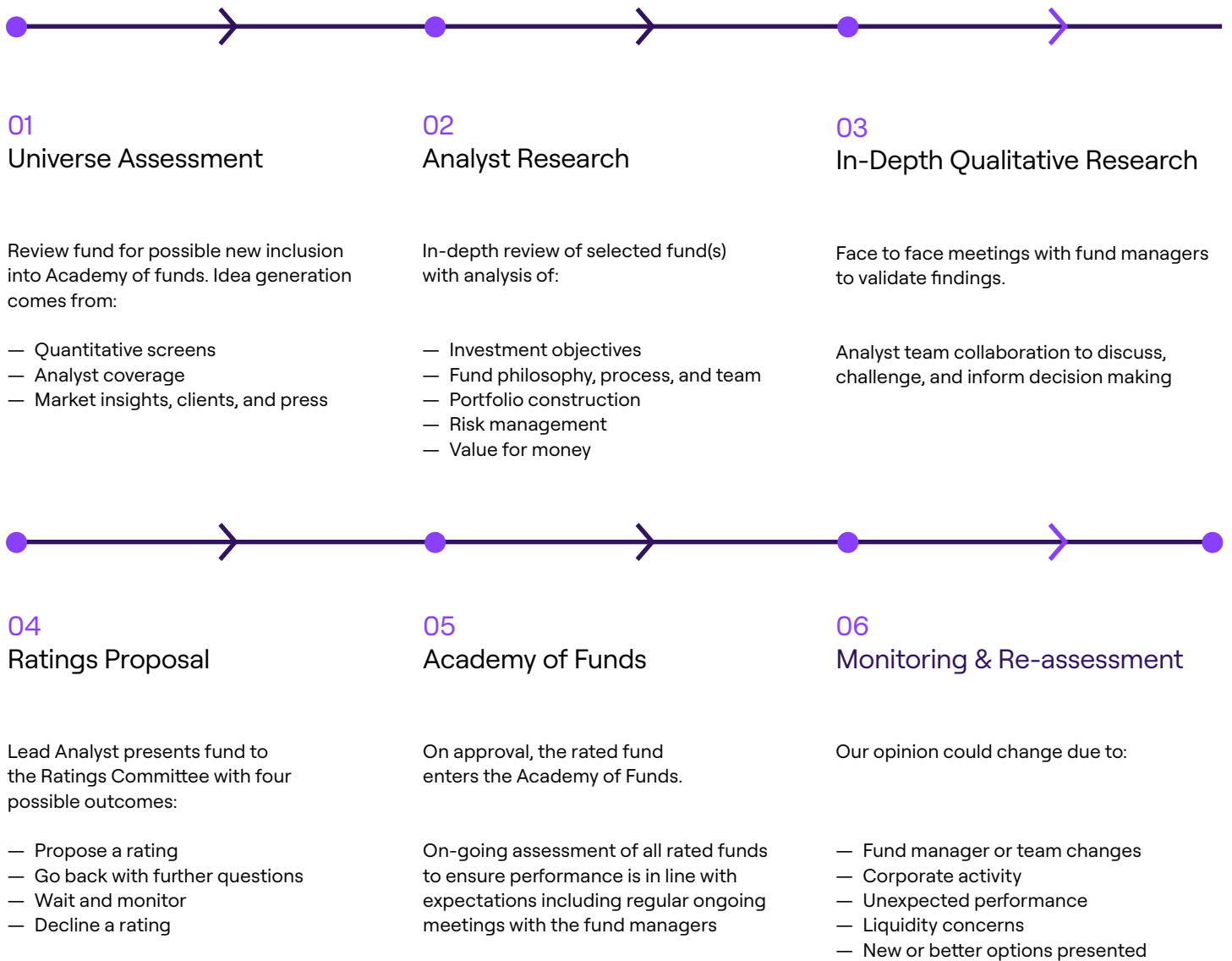
This is why our Titan Square Mile MPS is driven by Research. In fact, with over 3,000 funds available in the UK, only a small percentage of these pass through our robust research and selection process, offering a condensed universe of strategies which we believe have the best prospects of meeting their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



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

## 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 ecosystem 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.



Strategic Asset Allocation sets long-term risk and return framework



Titan Square Mile Academy of Funds rated universe  
Passive, active, income, sustainable analysis

Titan Investment Solutions funds  
and unitised Titan Square Mile range



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 Harris**  
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

# 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.

## Contacts

---

### John Lester

Senior Business Development Director  
Strategic partners, South West  
and Wales  
john.lester@titanwh.com  
07786 074 804

---

### Giles Whittingham

Business Development Director  
North East, Scotland, and  
Northern Ireland  
giles.whittingham@titanwh.com  
07903 040 116

---

### Charlie Horrell

Business Development Manager  
South London and South East  
charlie.horrell@titanwh.com  
07435 318 257

---

### Cameron Fearon

Business Development Manager  
North London and East  
cameron.fearon@titanwh.com  
07353 155 516

---

### Mark Hutson

Sales Partner  
North West and Midlands  
mark.hutson@titanwh.com

---

## Disclaimer

---

This document is marketing material issued and approved by Square Mile Investment Services Limited ("SMIS") which is registered in England and Wales (08743370) and is authorised and regulated by the Financial Conduct Authority. The independent research is provided by Square Mile Investment Consulting and Research Limited ("SMICR") which is not authorised or regulated by the Financial Conduct Authority and does not undertake regulated activities. Titan Square Mile is a trading style of SMIS and SMICR. SMIS and SMICR are wholly owned subsidiaries of Titan Wealth Holdings Limited (Registered Address: 101 Wigmore Street, London, W1U 1QU).

Our thoughts expressed in this document relate only to the portfolios we manage or advise on, on behalf of our clients, and as such may not be relevant to portfolios managed by other parties.

Unless otherwise agreed by SMIS, this document is only for internal use by the permitted recipients and shall not be published or provided to any third parties. This brochure is aimed at professional advisers and regulated firms only and should

not be passed on to or relied upon by any other persons. It is not intended for retail investors, who should obtain professional or specialist advice before taking, or refraining from, any action on the basis of this document. It is published by, and remains the copyright of, SMIS. SMIS makes no warranties or representations regarding the accuracy or completeness of the information contained herein. This information represents the views and forecasts of SMIS at the date of issue but may be subject to change without reference or notification to you. This document does not constitute investment advice, a recommendation regarding investments or financial advice in any way and shall not constitute a regulated activity for the purposes of the Financial Services and Markets Act 2000. Should you undertake any investment activity based on information contained herein, you do so entirely at your own risk and SMIS shall have no liability whatsoever for any loss, damage, costs or expenses incurred or suffered by you as a result. SMIS does not accept any responsibility for errors, inaccuracies, omissions, or any inconsistencies herein. Past performance is not an indication of future performance.

Source of data: Titan Square Mile, unless otherwise stated.

