

# Our investment philosophy

Underlying our investment recommendations are strong principles that frame our approach and subsequent management of your portfolios. Our philosophy is long-term with a clear focus on active management and risk control.

## TRANSPARENCY

We want every client to be able to understand and feel comfortable with all the investments they hold and the risks they are taking. We encourage our clients to have realistic investment expectations.

## RISK MANAGEMENT

All investment involves uncertainty and investment management requires the acceptance and management of the various constituents of investment risk.

## OUTCOME

Our clients have worked hard to be in their financial position. Our role is to protect, preserve and cultivate your assets to enhance your options in later life and help secure the family legacy. We believe this requires the provision of investment solutions and not savings products.

## ACTIVE MANAGEMENT

We never forget that investment performance is cyclical and occasionally subject to fads and fashions. We believe in active management and adjust client portfolios based on our assessment of the investment cycle to help protect your interests or capture new opportunities.

## EXPERTISE

We invest only in areas and asset classes that we understand and can explain. We actively avoid complex investment schemes. Our experience and knowledge are key ingredients in our investment performance whilst a core expertise lies in our knowledge of equity investment. When selecting shares we seek out those companies with competitive advantages in niche markets and continued potential for growth. We are patient and invest when we see value. This approach often creates a bias towards smaller companies with value credentials.

## PROXIMITY

We invest in direct securities through local markets wherever possible. For asset classes where we have insufficient proximity or expertise, we use collective investment schemes which possess the key ingredients to meet a particular investment objective. This allows us to maximise our expertise and reduce the costs of investment.

## ALIGNED INTERESTS

Alignment of interests is important to us. Our directors' portfolios are invested in our own model portfolios - providing a real and genuine oversight and interest in the outcomes of our model portfolios.

### Important Information

The value of investments can fall as well as rise and you may not get back the amount originally invested. The income from investments may vary. Past performance is no guarantee of future performance. Nothing in this document constitutes advice.

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# Get in touch

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