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Collidr launches MPS portfolios starting at 7 bps

- Collidr's 'Select Portfolios' will be available on 15+ platforms to start, and include a range of passive, active, income, sustainability, and decumulation investment style options
 - The portfolios will be aggressively priced overall, starting as low as 7 bps

Collidr, the AI-driven discretionary investment manager, has launched a suite of ready-made, easy-to-implement model portfolios – Select Portfolios. This service provides advisers with a range of investment style options to choose from, including:

Investment Style	Description	DFM Charge
Strategic Index	Strategic asset allocation with low-cost implementation utilising lower cost and passive index funds	0.07%
Enhanced Index	Active asset allocation with low-cost implementation utilising lower cost and passive index funds	0.12%
Hybrid	Active asset allocation and dynamic risk management through a hybrid implementation, investing across a mix of active, index and lower cost funds	0.15%
Active	Active asset allocation and dynamic risk management using any type of fund or style, which may rotate through time	0.17%
Income	Active asset allocation which seeks to deliver a natural yield from diversified sources, investing across a mix of active, index and lower cost funds	0.17%
Responsible	Financially driven asset allocation with an implementation focused on investing across a mix of active, index and lower cost funds, which meet a higher degree of integration with sustainability criteria	0.20%
Decumulation	Active asset allocation and dynamic risk management seeking to provide a controlled performance and volatility profile	0.20%

Collidr's data and evidence-based ('Quantimental') approach utilises Collidr's proprietary investment technology to deliver an enriched client experience through reporting, investment analytics, and risk management. This investment approach combines Collidr's team of experienced institutional fund managers with behavioural research and the latest AI-driven technology to ensure that investments are suitable for each portfolio.

Symon Stickney, CEO of Collidr, says: "Leveraging our successful 15 year track record of partnering with adviser firms to manage and help them build their own bespoke model portfolios, we have created Select Portfolios for those advisers who simply want an off-the-shelf model portfolio solution for their investment proposition."

According to Symon Stickney, "There is a marketplace for both types of MPS – fully bespoke and ready-made solutions. We've seen some of our adviser firms achieve

their long-term business objectives, whether that's creating their ideal bespoke model portfolio solution or realising great value for their business in a capital transaction, through utilising a fully bespoke investment approach. However, some advisers simply want the choice to buy an off-the-self solution. Collidr has always listened to adviser firms in terms of what's important to them, being flexible in how best we can help. Regardless of investment style preference, I believe, since 2010, we have demonstrated our ability to deliver results at a low cost and at great value to advisers."

According to Patrick Jones, Director, Sales, there are a number of key aspects that help differentiate Collidr's proposition from competitors:

1. Collidr's long-term track record of outperformance in the MPS space, and our ability to understand adviser businesses, finding ways to help improve or enhance their investment proposition. This can include building a bespoke discretionary model service, transitioning adviser models to a new bespoke service, or deploying new technology to help advisers manage their own models, through reporting and risk management tools.
2. Collidr's institutional investment capabilities and approach to forming a strong partnership to support advisory firms.
3. Collidr's market-leading technology, with risk management and interactive reporting tools, which allows advisers to spend more time with clients. This is particularly important in light of the FCA's Consumer Duty which has sharply increased the compliance burden on adviser firms.

Symon Stickney added, "We will continue to see rising demand for all forms of MPS offerings over the coming years, from easy-to-implement 'select' portfolios to fully bespoke MPS solutions, which deliver the investment proposition advisers are looking for. In today's market, there is no one-type-fits-all model."

"However, the number of adviser firms which focus on using technology to benefit their businesses has never been greater. Collidr has recently launched a new AI-driven, portfolio management and reporting platform to address this – Noxai. This technology allows advisers to further automate and augment their portfolio oversight, risk management and personalised reporting, helping to improve productivity and enhance the overall client experience," said Symon Stickney.

ENDS

About Collidr

Launched in 2010, Collidr's operations include an investment management firm, Collidr Asset Management Limited, which is authorised and regulated by the Financial Conduct Authority and uses Collidr's proprietary AI technology, and Collidr Technologies Limited, which offers this technology on a stand-alone basis, in addition to research services, empowering investors to make better investment decisions and digitalise the investment process.

Collidr believes every investor would benefit from a disciplined, systematic approach to managing their investments, one that leverages intelligence-led technology every step of the way.

Partnering with trusted advisers, Collidr's technology and services are available to: Financial Advisors, Wealth Managers, Actuarial Consultants, Private Banks, Life Companies,

Pension Scheme Advisors / Providers, Asset Managers, Discretionary managers, Family Offices.

Collidr technology powers global client assets of c£8+ billion.

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