collidr

IntelligentMPS

Select Portfolios

INVESTING TRANSFORMED

About Select Portfolios

It's straightforward and easy to implement:

1 Access any style of risk rated portfolio:

1. Strategic Index
2. Active Index
3. Hybrid
4. Active
5. Income
6. Responsible
7. Decumulation

2 Determine your ideal number of risk profiles (portfolios)

3 Choose from any of the 15+ platforms currently available and growing – we are platform agnostic

The Select MPS difference

» A data and evidence-based approach, using the science of behavioural investing

» The latest technology to deliver an enriched client experience through reporting, investment analytics, and risk management.

Benefits:

Control

It's your brand, your clients, make it your model portfolio service

Your choice

Choose any investment style of risk-rated portfolios suitable to your advice process and client needs

Technology

Leverage an interactive system to enhance your investment proposition and client experience

Reporting

Access reporting tools that deliver customisable content to you and your clients, e.g. model portfolio factsheets, investment committee reports

Service

Use an award-winning proprietary approach built on data, evidence & leading technology

Investment management

Access Collidr's investment strategist team, providing ongoing support to your business

Transparency

All investment decisions and research are provided on a proactive basis throughout the process

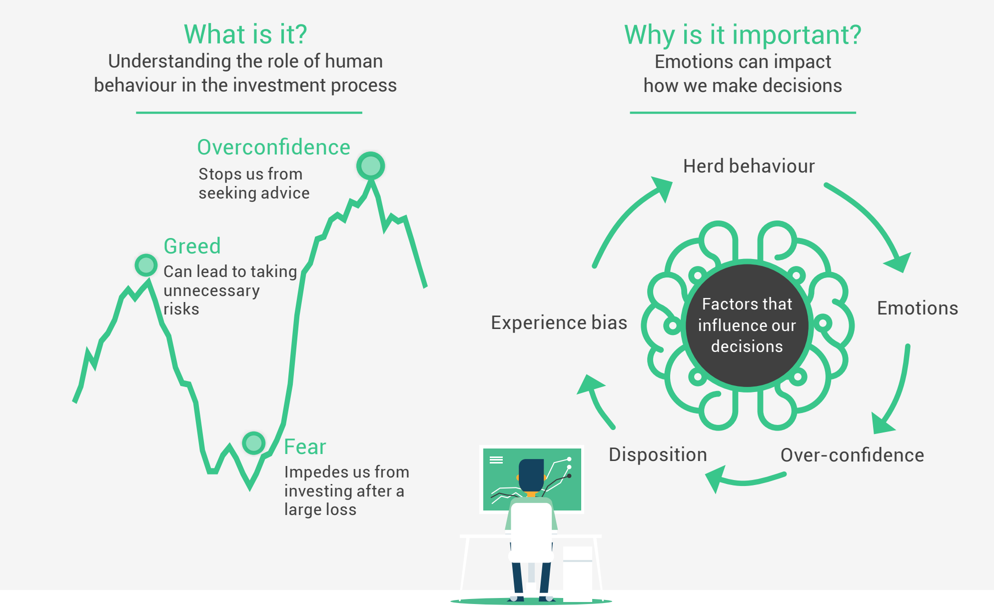
Low Cost

Access these portfolio options, and institutional share classes through Collidr's scale, at highly competitive prices

Cost effective solutions to save you time and create value for you and your clients

Why Choose Select Portfolios?

Spotlight on Behavioural Investing

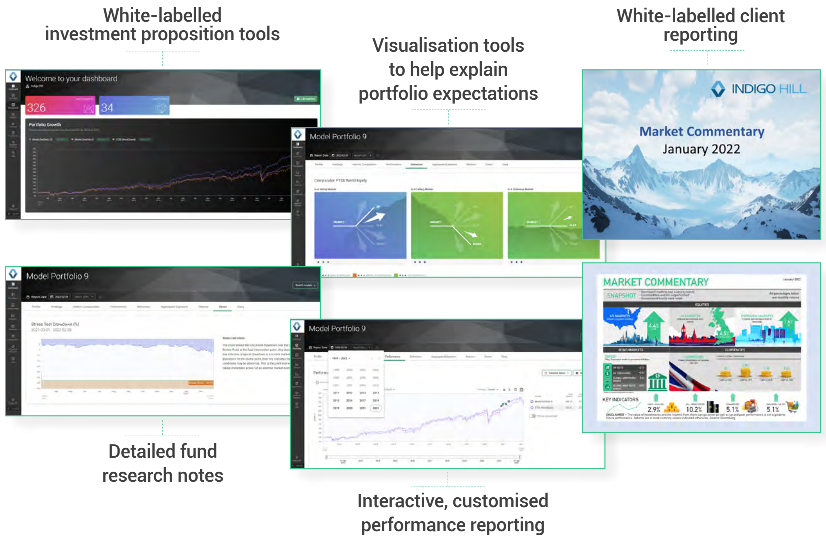


Diversification matters

APPROACH	STRATEGY	PORTFOLIOS
Quantitative and process driven	Style agnostic	Outcomes by design
Evidence and data led	Unconstrained thinking (not following the crowd)	Adaptive risk control
Team managed	Global multi asset, multi strategy approach	Compounding off reduced drawdowns
Applying research which avoids behavioural bias	Quantitatively & systematically monitored	Dynamic rebalancing capability

Technology – enhancing the client

- Live interactive performance up until the last business day's price!
- Model factsheet report production on demand, with market commentary and performance commentary within 10 working days of month end.
- Customisable model factsheets and interactive reports
- Intelligent portfolio tools for investment and holdings analysis
- Live 24/7 risk tracking and alerting tools to keep you informed
- Investment committee packs produced to demonstrate your value



Pricing – Easy to use, great value portfolios

INVESTMENT STYLE	DESCRIPTION	DFM CHARGE
Strategic Index	Strategic asset allocation with low-cost implementation utilising lower cost and passive index funds	0.07%
Active 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%
Decumulation	Active asset allocation and dynamic risk management seeking to provide a controlled performance and volatility profile	0.20%
Responsible	To learn more about our options for responsible investing, please enquire with us about our partnership with Worthstone for the Wellth Portfolios	0.18%

What we deliver

- **Thinking differently** – A proprietary process blending quantitative research with fundamental knowledge and experience
- **Controlled performance** – A successful track record of delivering outcomes, since 2010
- **Risk management** – systematic breach detection and alerting across all portfolios
- **Execution** – systematic and rules-based discipline with human oversight & trading
- **Transparency** – access to live and interactive portfolio performance tracking, investment research and rationales

Collidr in numbers

- History – Launched in 2010.
- Technology – powering a global client base with £8+ billion of assets.
- Investment management – directly manage clients with over £3+ billion of AUM.
- Investment team – average industry experience of 20+ years.
- Investment instruments – screen over 250K funds, investment trusts and ETFs, and over 10K stocks, bonds and derivatives.
- Research – quantitative analysis of over 7K UK and off-shore funds and ETFs.
- Recognition – multiple industry awards.
- Offices – London, Manchester, Jersey.

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