








OVERVIEW

The Sustainable Multi Asset portfolio offers a cost effective, diversified option, which is driven by our allocation process. Each selection is specifically designed to meet your risk and objectives.

We hand pick assets for each of these portfolios, based on their sustainability and ethical approach.

KEY FEATURES	
	Our goal is to grow your wealth (after inflation), over the long-term.
	Our portfolios are constructed to generate a balance between cost, risk and investment opportunity.
	These are globally diversified portfolios, which are invested across core asset classes such as equity, fixed income, infrastructure and cash.
	We offer you an actively managed portfolio (with 5 varying risk levels), which are rebalanced on an ad-hoc basis where required.
	Aubrey is a signatory to the UN-supported Principles for Responsible Investment (PRI).
	We ensure consistency and suitable levels of risk within each portfolio.
	Available via our custody and administration platform.

**LAUNCHED IN
2018**

**EMPHASIS ON
SUSTAINABLE
INVESTMENTS**

**CHOICE OF
INVESTMENT
SOLUTIONS**

ADDITIONAL INFORMATION	
Eligibility	General Investment, SIPP, Trust, Charity, Company & ISA
Est no. Holdings	20 - 30

CHOICE AND FLEXIBILITY

We have constructed a range of multi-asset portfolios, so you can choose the option that suits you best:

Risk Category	Equity Risk Allocation %	Target Volatility	Investment Comparator
Lower	20-30	4-8	ARC Sterling Cautious PCI
Lower to Medium	30-50	7-10	ARC Sterling Cautious PCI
Medium	40-60	9-12	ARC Sterling Balanced Asset PCI
Medium to Higher	50-70	11-14	ARC Sterling Steady Growth PCI
Higher	60-80	13-16	ARC Sterling Equity Risk PCI

www.aubreycm.co.uk

IMPORTANT INFORMATION

Capital at risk: investments may fall as well as rise, and you may not get back the full amount invested.

Aubrey is authorised and regulated by the Financial Conduct Authority (registered number 455895) and is registered as an Investment Adviser with the US Securities & Exchange Commission.

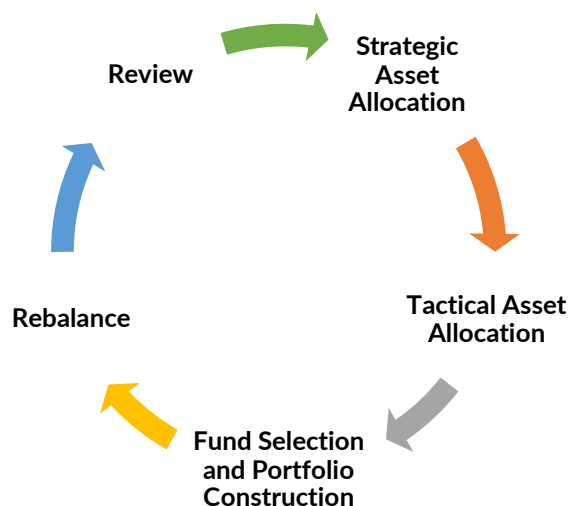
OUR INVESTMENT PROCESS

When constructing each of our portfolios, we use **Active, Passive and Factor/Smart Beta*** investments.

Our goal is to understand the potential returns vs the possible risk, from each individual investment and collectively as a whole portfolio.

We do this by investing in different assets, to spread and diversify any risk.

- ✓ **Global equity exposure.**
- ✓ **Consistent geographic equity split across each model.**
- ✓ **We use active managers in less efficient areas of the market.**
- ✓ **Use of passive investments for diversification and to reduce underlying costs.**
- ✓ **Factor investments to target specific market areas depending on the investment cycle.**



We believe in achieving long-term positive returns (after inflation) by investing in diversified, multi-asset portfolios, which are designed to produce attractive risk-adjusted returns.

*** Factor/Smart Beta** strategies choose securities from an index. These are based on specific attributes such as Quality, Value and Minimum Volatility. They also combine the lower cost and rules-based approach of passive investing with the targeted attributes of active investment.

YOUR INVESTMENT TEAM



David Neilson
Investment Manager



Chris Sutton
Investment Manager

IMPORTANT INFORMATION

This document has been issued by Aubrey Capital Management Limited which is authorised and regulated in the UK by the Financial Conduct Authority. It has been prepared solely for information purposes and does not in any way constitute advice and is not a solicitation, or an offer to buy or sell any security.

Please note that the prices of shares (and any income produced from them) can fall as well as rise and you may not get back the amount originally invested. This can be as a result of market movements or due to variations in the exchange rates between currencies. Past performance is not a guide to future returns and may not be repeated.