



PORTFOLIOMETRIX
Investment Management **by Design**

WHY PORTFOLIOMETRIX

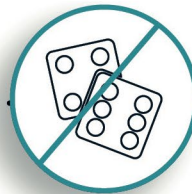
PortfolioMetrix and Conexim offer a new style of investment management, one that challenges the usual investment propositions by providing tailored portfolios within a Centralised Investment Proposition, putting you firmly in the driving seat to deliver a high value service for multiple clients.



Better Investment Outcomes



Deeper Client Analysis



De-Risks Your Business



Increased Productivity



CUSTOMISED MODEL PORTFOLIOS

Over 50 sensibly diversified portfolios covering the entire risk spectrum.



ADAPTABLE PORTFOLIOS

Incorporates client preferences including Active, Passive, Factor Based Investing and ESG.



ADVANCED SOFTWARE

Builds portfolios in minutes, customises portfolios live in front of clients, allows visual changes to be seen as parameters are adjusted, adding value to the client experience.



DE-RISKS YOUR BUSINESS

Conexim, supported by PortfolioMetrix, undertakes the day to day management of the portfolios, including Asset Allocation, Fund Selection, Monitoring and Rebalancing so you have more time to spend with new and existing clients.



DEEPER CLIENT ANALYSIS

Personality profiled (not just risk graded) addressing global regulators' concerns over shoehorning and client suitability.



PERFORMANCE

Consistent track record of risk adjusted returns providing better outcomes for clients with greater transparency.



TAXABLE SOLUTIONS

Portfolios may be subject to Exit Tax and/or CGT/Income Tax depending on the investors' circumstances. *In all matters related to tax, investors are advised to always seek appropriate advice and guidance from a recognised specialist in the field.*



EXCLUSIVE ADVISER SERVICE

Our outstanding service was recognised by winning the Citywire Wealth Manager Regional Stars Award for Greater London 6 years running as voted for by financial advisers.



NO MINIMUM INVESTMENT

Accessible for ALL clients.

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ADVISOR SUPPORT & SERVICES

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