



Fairstone Brooks Macdonald offers global expertise, active investment strategies, and tailored growth and income solutions to meet your financial needs

Fairstone Brooks Macdonald offers an actively managed, globally diversified portfolio range developed in partnership with Brooks Macdonald. With over 30 years of experience, it provides both growth and income-focused solutions designed to outperform the market.

## AT A GLANCE

**0.25%**

Investment Management Charge (IMC)  
(p.a)

**0.40 - 0.50%**

Ongoing Charges Figure (OCF)  
(p.a)\*

*We rebalance your investments  
quarterly to keep them aligned  
with your risk tolerance and goals*

*\*as of 23 May 2025*



## EXPERT OVERSIGHT

Managed by Brooks Macdonald's experienced Model Portfolio Service (MPS) team, supported by specialists in asset allocation and sector research to deliver optimal investment strategies.

## DIVERSIFIED APPROACH

Utilises a "barbell" strategy, balancing safer, stable investments with higher-risk, potentially higher-reward opportunities to optimise both risk and return.

## TAILORED INCOME AND GROWTH OPTIONS

Offers portfolios designed to cater to both income-focused investors seeking regular cash flow and growth-oriented investors looking for long-term capital appreciation.

## RISK-ALIGNED

The portfolio is aligned with your agreed risk level, ensuring it stays within your comfort zone while adapting to changing market conditions.



MEET THE MANAGER

Senior investment managers at Brooks Macdonald, each with a strong track record of delivering performance through a centralised and disciplined investment process.

EXPERTISE BEHIND THE PORTFOLIO

Centralised Investment Process

Ensures consistency and high-quality decision-making in key areas such as asset allocation, fund selection, and performance monitoring.

Specialist Sector Research

Dedicated sector teams provide in-depth research, helping inform diversified and intelligent investment decisions.

Barbell Strategy

Balances defensive investments with growth-focused opportunities, optimising both stability and potential for higher returns.

WHAT THIS MEANS FOR YOU

Enhanced Portfolio Stability

The strategic approach ensures your portfolio remains resilient in volatile markets while targeting steady growth.

Maximising Growth Potential

The combination of growth-focused assets and tactical adjustments aims to capture market opportunities, helping to accelerate capital appreciation.

Tax Efficiency

Uses “building block” funds to help reduce exposure to Capital Gains Tax liabilities, helping you to retain more of your returns.

The scales below show where Fairstone Brooks Macdonald fits in terms of investment strategy and geographic focus.

The investment strategy scale ranges from passive, following market indexes with lower fees, to active, making decisions to try and beat the market, with higher fees.

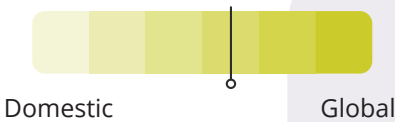
INVESTMENT STRATEGY



\*The value of investments, and the income from them, can go down as well as up and you may get back less than the amount invested.

The geographic focus scale ranges from domestic, investing mainly in the UK, to global, investing in markets around the world, offering more diversity but also potentially higher risk.

GEOGRAPHIC FOCUS



SCAN THE QR CODE to access detailed fact sheets for our range of risk-rated options for Fairstone Brooks Macdonald and discover how to tailor your investments.



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