



Growth-focused, diversified strategies with a specialised focus on fixed income to help you achieve your financial goals

Developed with Charles Stanley, this actively managed global portfolio invests in stocks, bonds, and alternatives, offering both growth and income options. It ensures diversification and balances risk with expert asset allocation, optimising returns to suit your risk profile.

AT A GLANCE

0.25%

Investment Management Charge (IMC)
(p.a)

0.28 - 0.47%

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 MANAGEMENT

Led by Charles Stanley's experienced asset management team, following a disciplined and centralised investment process.

GRANULAR FIXED INCOME EXPOSURE

A focused approach to fixed income, allocating investments across sub-asset classes where value opportunities are identified.

DIVERSIFIED PORTFOLIOS

Constructed to cater to a broad range of risk levels, drawing on the expertise of Charles Stanley's asset allocation and investment committees.

RISK-ALIGNED

Designed to match your agreed risk level, ensuring the portfolio stays within your comfort zone and adapts to market conditions.

CHRIS
AINSCOUGHPETER
BROOKES

MEET THE MANAGERS

Head of Asset Management and Senior Fund Manager at Charles Stanley, each bringing extensive experience in multi-asset investment strategies, focusing on capital growth and diversification to deliver long-term value.

EXPERTISE BEHIND THE PORTFOLIO

The Fairstone Charles Stanley portfolio benefits from Charles Stanley's disciplined, centralised investment process. Their strategic asset allocation creates well-diversified, growth-focused portfolios, while a granular

approach to fixed income targets high-value opportunities. The team combines in-depth market insights with multi-asset diversification to deliver balanced, risk-aligned portfolios.

WHAT THIS MEANS FOR YOU

Expert Oversight

Managed by the experienced Charles Stanley team, ensuring that your investments benefit from a robust, disciplined investment process.

Tailored Fixed Income Exposure

Targeting fixed income opportunities for growth and capital preservation, enhancing the overall portfolio.

Diversified, Risk-Aligned Portfolios

Your investments will be diversified across various asset classes, tailored to match your agreed risk profile and adjusted to market changes as needed.

The scales below show where Fairstone Charles Stanley 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



Passive

Active

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



Domestic

Global

*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.

SCAN THE QR CODE

to access detailed fact sheets for our range of risk-rated options for Fairstone Charles Stanley and discover how to tailor your investments.

