



Growth-focused, diversified strategies with flexible investment options to support your financial objectives

Fairstone James Hambro offers an active, global multi-asset portfolio range designed for flexibility. The range is comprised of three James Hambro 'Harrier' building block funds: Global Equities, Fixed Income, and Diversified Strategies, all managed internally by James Hambro. These building block funds contain a mix of direct, listed line items and third-party funds, designed to offer a low-cost, flexible, and efficient actively managed solution. This approach combines the sophistication of custom-made portfolios with the structure of a managed portfolio service (MPS).

AT A GLANCE

0.25%

Investment Management Charge (IMC)
(p.a)

0.32 - 0.51%

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*



COST-EFFECTIVE ACTIVE MANAGEMENT

Custom 'building block' funds secure pricing discounts, passing 100% of the savings directly to clients.

EXPERT-LED MANAGEMENT

Managed by James Hambro's experienced asset allocation and security selection teams.

HIGH CONVICTION

Designed to capitalise on distinctive, high-conviction investment ideas across a wide array of asset classes.

RISK-TARGETED

Portfolios are aligned with your agreed risk level, ensuring investments remain within your comfort zone and adapt to changing market conditions.



MEET THE MANAGER

Billy Hughes is joint Head of Professional Adviser Services at James Hambro & Partners, with a strong background in portfolio management, strategic asset allocation, and high-conviction investment strategies, gained through years of experience in both operational and investment roles.

EXPERTISE BEHIND THE PORTFOLIO

The Fairstone James Hambro range benefits from the deep market expertise of James Hambro & Partners. Their team utilises insights from multiple asset classes and instruments,

combining flexibility with a robust, risk-aware investment process. This ensures the portfolio is dynamic, capitalising on unique opportunities while managing risk.

WHAT THIS MEANS FOR YOU

Tailored Flexibility

Access to a diverse range of investment instruments, providing more tactical opportunities to adapt to market conditions and meet your specific investment goals.

High-Conviction Ideas

Benefit from unique, high-conviction investment strategies designed to capture market opportunities that offer superior growth potential.

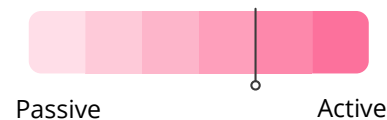
Risk-Managed

With portfolios aligned to your agreed risk level, you can feel confident that your investments are managed in line with your comfort zone while remaining responsive to market changes.

The scales below show where Fairstone James Hambro 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 James Hambro and Partners and discover how to tailor your investments.



info@fairstone.co.uk | www.fairstone.co.uk | 0800 884 0840

Fairstone Private Wealth Ltd is authorised and regulated by the Financial Conduct Authority under FRN 457558. Registered in England under No: 05869447. The regulated firms are all part of the Fairstone Group Limited. Company No: 06599555. Registered address: 8 Camberwell Way, Doxford International Business Park, Sunderland, SR3 3XN.

© Copyright 2025 Fairstone Group. All rights reserved.