



Casterbridge

Discretionary Portfolio Service

INVESTOR BROCHURE

INTRODUCTION

Investing — on your terms

What does investing mean to you? For most people, investing is a way to set aside something today so you can live the life you want tomorrow.

Of course, every investment comes with a degree of risk. Nothing ventured nothing gained, as they say. But choosing the right investment manager, one that understands what matters to you, can take some of the worry out of it and leave you feeling confident about what the future holds.

At Casterbridge, we've spent the last decade working hard for our clients, by building investment portfolios

that make their money work harder. Our Discretionary Portfolio Service offers the highest level of investment personalisation. We've designed it to be flexible, tax-efficient, and capable of evolving as your needs change.

So, whether you're after long-term growth, regular income or a combination of the two, your portfolio will feature carefully-chosen assets designed to meet your investment objectives, giving you the time and space to live the life you want.



Focused on your wealth journey

Discretionary management means we will build you a portfolio capable of meeting the demands of today's investment markets. Your portfolio will benefit from an optimal blend of both active and passive investments spread across different asset classes, and featuring a carefully-chosen selection of high-quality funds managed by some of the world's most capable fund managers.

While other discretionary portfolios invest only in funds, our in-house research team looks beyond collective investments to include international direct equities, thereby increasing the wealth generation opportunities available to you. We are free to invest based on where our experience, research, and insights take us, not where our competitors are.

But the distinct advantage of our Discretionary Portfolio Service is that your investment portfolio will be managed on a day-to-day basis by a dedicated Investment Manager. It's their responsibility to steer your investments, while staying fully focused on your objectives, goals and aspirations.

Our approach gives you a portfolio greater than the sum of its parts, capable of delivering the best possible investment returns without taking too many risks. It's what discretionary portfolio management ought to be. As with any investment, you could lose money and get back less than you originally invested.



TRUE PORTFOLIO DIVERSIFICATION

Managed to deliver more

Our Discretionary Portfolio Service is one of the easiest ways to own a portfolio consisting of the best investments available, across different asset classes, regions and sectors.

Active management means we will assemble and then manage a portfolio of investments on your behalf. These take into account such aspects as your investment objectives and your attitude towards risk, so your portfolio always stays within your comfort zone.

As well as a blend of international direct equities and funds, your portfolio may include other assets, such as government and corporate bonds, commodities, such as precious metals, as well as cash and money market instruments. This unique combination means your

portfolio is always well-diversified, actively seeking new opportunities, and staying resilient in volatile market conditions.

You don't need to monitor or adjust your investments, we do it all for you. Your experienced investment managers make any necessary adjustments on your behalf, based on decades of market knowledge and investment experience.

You'll receive regular updates and performance reports on how your portfolio is doing, helping you stay informed without being overwhelmed. You can view your investments securely online 24 hours a day, seven days a week, so you'll never feel out of the loop or left to worry about market ups and downs.

And because we believe our Discretionary Portfolio Service investors deserve a best-in-class service, you can request meetings with your dedicated Investment Manager, either in-person or over the phone.

PARTNERSHIP APPROACH

Working with your financial adviser

Our Discretionary Portfolio Service is only available through your financial adviser. We'll work closely with them to agree the most appropriate investment portfolio based on your financial circumstances and objectives, and to achieve the right investment outcomes for you.



The Casterbridge difference

We're an independent, discretionary fund management business, created to give investors like you greater choice and flexibility, while achieving your long-term financial objectives.



TAILORED INVESTMENTS

We will build a diversified investment portfolio tailored to your specific needs that works hard for you. Above all, we stay focused on your investment goals every single day.



PRINCIPLES-BASED INVESTING

We focus on what matters to you, not on chasing benchmarks or comparing ourselves to peers. This means your portfolio stays aligned with the goals and preferences you discussed with your adviser from the very start.



DYNAMIC APPROACH

Investment markets can change rapidly. Our investment team is able to respond quickly, making key decisions on your behalf and finding the best available opportunities.



24-7 PORTFOLIO ACCESS

We'll keep you updated on your progress with regular portfolio reporting, and you can view your investments securely online 24 hours a day, seven days a week.

How Casterbridge works for you

For us, wealth management is about achieving investment excellence while delivering the highest levels of service. But above all, it's about knowing what it takes to make your money work harder for you.



Whether you're after long-term growth, regular income or a combination of both, your portfolio will feature carefully-chosen assets designed to meet your investment objectives.



Having a deeper understanding of your financial goals and aspirations means we'll manage your investment with those in mind.



Being truly impartial means we can select the best-available investments for your portfolio, basing our decisions on quality and suitability.



Our focus on delivering exceptional client service, day-in day-out, means you'll never be left feeling short-changed.

WHO WE ARE

About Casterbridge


Since 2016, we've been working hard to give investors the portfolios they deserve, by combining investment flexibility, exceptional yet cost-effective management, and a total commitment to client service.

We created Casterbridge because we felt people deserve proudly independent, adaptive, and agile investment management. With extensive industry expertise and a passion for delivering better outcomes, we developed a discretionary fund management service that offers greater choice, flexibility, and a more personalised approach. It's investment management as it should be done.



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Casterbridge

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