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# HARDY

MANAGED PORTFOLIOS

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CASTERBRIDGE WEALTH  
INVESTMENTS



# MAKING AN IMPACT

Casterbridge Wealth is an independent, award-winning discretionary fund management business. We understand the importance of creating portfolios built to withstand difficult conditions. It's why we call our seven managed portfolios the 'Hardy' range.

*Hardy/'ha:di/ Adjective*

*Strong and capable of enduring difficult conditions; robust, enduring, strong  
'a hardy breed of investment portfolio'*

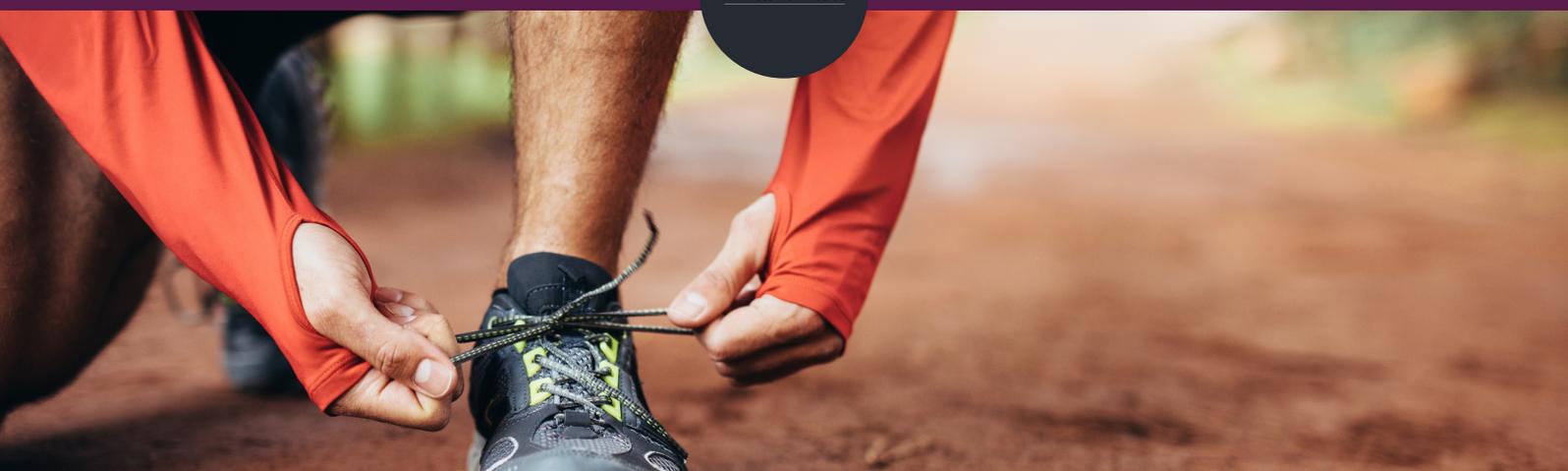
## THE HARDY MANAGED PORTFOLIOS

The Hardy Managed Portfolio range features seven risk-rated investment profiles. Each is actively managed across different asset classes, such as shares, bonds, alternatives and cash, featuring both active and passive investments. Assembled with the aim to deliver the best possible investment performance while remaining in line with the amount of investment risk you are comfortable taking. Each portfolio gives you instant access to a wide range of high-quality funds, managed by some of the world's leading fund managers, all within a single portfolio.

Your portfolio is managed day-in, day-out, by our experienced team of managers and analysts. It's their job to put different investments together to create a portfolio greater than the sum of its parts.

Our portfolios are only available through Financial Advisers. Your Adviser can help you determine the appropriate Hardy Managed Portfolio based on your circumstances and objectives.

**HARDY**  
MANAGED PORTFOLIOS

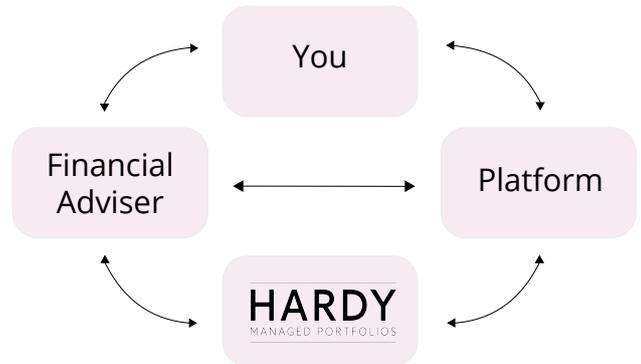


# WORKING IN TRUE PARTNERSHIP

We work closely with your Financial Adviser to achieve the right investment outcomes for you. The service we offer is called 'Discretionary Investment Management' - this means it's our job to ensure your money is invested in the best possible way to help it grow and meet your financial goals and dreams. But the service we offer is more than just an investment – it's a long-term relationship between you, your Financial Adviser and us.

## What is Discretionary Investment Management?

We assemble and manage a diversified portfolio of investments on your behalf. These portfolios take into account such aspects as your investment objectives and your attitude towards risk. Following discussions between you and your Financial Adviser, they will determine which Hardy Managed Portfolio is right for you.



## Working together with your Financial Adviser

We have designed and built seven investment portfolios within the Hardy Managed Portfolio range, enabling your Financial Adviser to select the portfolio that is most suitable for your current needs. In addition, it gives your Adviser the flexibility to change the selected portfolio as and when your personal needs change – the Hardy Managed Portfolio range is designed to evolve with you and your requirements.



### DESIGNED FOR YOU

Multi award-winning team, set up to be free of 'group think'. Delivering you: independent, responsive and agile investment management.



### 24-7 PORTFOLIO ACCESS

Whether you invest via our Direct Custody Service or via your chosen platform you can view your investments online 24 hours a day, seven days a week.



### INVESTMENT EXPERTISE

Your investment gives you access to our Investment Managers and Research Team. All our resources are devoted to helping you achieve the best possible returns at all times.



### DYNAMIC APPROACH

Investment markets often change rapidly. Our investment team can respond quickly, making important decisions on your behalf and finding the best available opportunities.

# OUR ACTIVE APPROACH

A dynamic and adaptive investment approach built to meet your needs.

In today's crowded investment market, our Hardy range stands out because of its innovative investment structure and investor-focused approach. Each Hardy Managed Portfolio applies some of the most sophisticated investment strategies accessible, all within a single, professionally managed portfolio. It is designed to be flexible and can evolve with you as your requirements change.

- **Seven risk-targeted investment profiles:** Each is actively managed across different asset classes such as shares, bonds and cash, to deliver the best investment performance for the amount of risk you are prepared to take.

- **True diversification:** Owning a Hardy Managed Portfolio is one of the easiest ways for you to own a well-diversified portfolio. Every investor, no matter the size of their investment, owns a portfolio of multiple underlying funds, managed by some of the world's most experienced fund managers.

- **Ongoing portfolio management:** We actively carry out fund selection, portfolio management and rebalancing (adjusting the spread of investments within each investment profile) so that the investment profile remains in line with your preferred risk level.

- **Pragmatic investment approach:** Our investment team will move between different underlying fund managers depending on their investment style and the prevailing market conditions, so that those funds in the 'sweet spot' are given the maximum opportunity to shine.



# HARDY MANAGED PORTFOLIOS

We understand the importance of creating portfolios built to withstand difficult conditions. It's why we call our seven managed portfolios the 'Hardy' range. Our Hardy Managed Portfolios give you instant access to a wide range of high-quality funds, managed by some of the world's leading fund managers, all within a single investment portfolio.

This means we can offer you a fully managed investment solution that closely matches your personal investment objectives and goals whilst delivering you outstanding value.

## The Seven Hardy Managed Portfolios

Regardless of which portfolio you and your Financial Adviser decide is right for you, you can be sure your money will be diversified across a wide selection of different underlying investments.

The seven risk-rated portfolios are made up of five growth portfolios and two income portfolios, as illustrated below:

Please talk to your Financial Adviser to find out which Hardy Managed Portfolio is most suitable for you.



# WANT TO FIND OUT MORE

For more information on the Sustainable Impact Portfolios, or any of our other Services, please contact your Financial Adviser.

Casterbridge Wealth Limited

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## IMPORTANT INFORMATION

### About us

Casterbridge Wealth Limited is authorised and regulated by the Financial Conduct Authority (FCA). Details of our authorisation are available on the FCA register under firm reference number 727583; [www.fca.org.uk/register](http://www.fca.org.uk/register).

Casterbridge Wealth Limited is a registered Company in England and Wales. Registered No. 09466507.

Registered Office: Suite 4 Brewery House, 36 Milford Street, Salisbury, SP1 2AP.

### About past performance and investment risk

You should be aware that past performance is not an indication of future performance, the value of investments and the income derived from them may fluctuate and you may not receive back the amount you originally invested.

### About this brochure

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