



CASTERBRIDGE
HARDY PORTFOLIOS

MAKING AN IMPACT

We understand the importance of creating portfolios built to withstand difficult conditions. It's why we call our managed portfolios the 'Hardy' range.

Our Hardy Managed Portfolios give you instant access to a wide range of the highest quality funds, managed by the most capable fund managers from around the world, all within a single investment.

Hardy/'ha:di/ Adjective

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



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 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 the world's leading fund managers, all within a single portfolio.

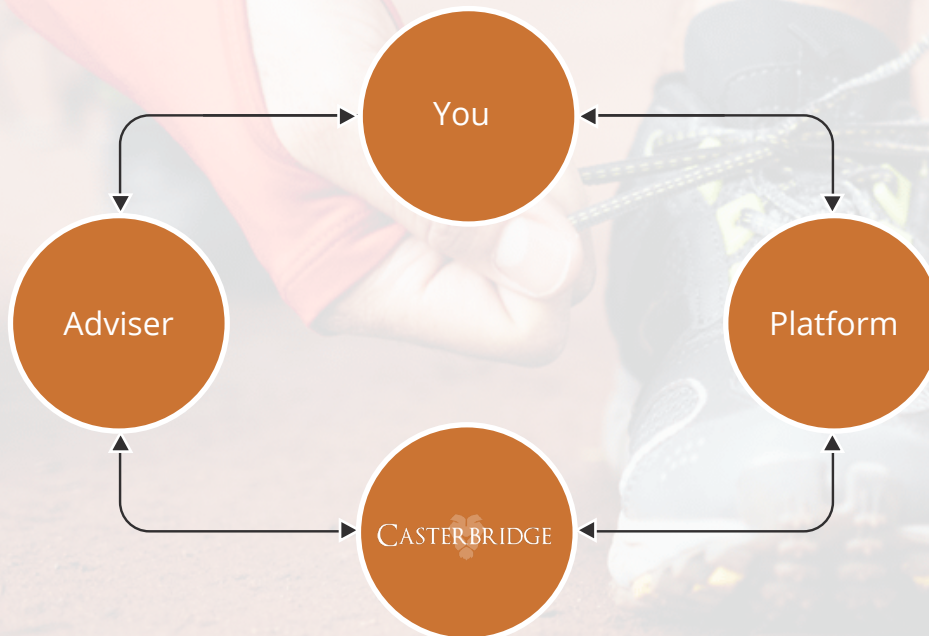
Your portfolio is managed day in, day out, by our experienced team of managers and analysts. It's their job to put different investments together to create a portfolio greater than the sum of its parts. Our portfolios are only available through financial advisers. Your adviser can help you determine the appropriate Hardy Managed Portfolio based on your circumstances and objectives.

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.

What is Discretionary Investment Management?

We assemble and manage a diversified portfolio of investments on your behalf. These 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.



KEY BENEFITS OF THE HARDY MANAGED PORTFOLIOS

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 them the flexibility to change the selected portfolio as and when your personal needs change – our Hardy Managed Portfolio range is designed to evolve with you and your requirements.



24-7 PORTFOLIO ACCESS

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



TAILORED SOLUTION

Casterbridge was set up to offer active portfolio management. We will build a diversified investment portfolio tailored to your specific needs that works hard for you.



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.



INVESTMENT EXPERTISE

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



ABOUT CASTERBRIDGE

We are an independent, multi award-winning discretionary fund management business, here to offer you choice and flexibility.

We were created by a passionate group of colleagues, committed to providing services to both current and future generations of clients.

We can assemble a diversified portfolio designed for your specific risk appetite and built to weather the rigorous tests of the market environment, now and in the future. We'll work closely with your financial adviser to understand your goals and your risk appetite.

For us, it's 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 for you.



Keith Edwards, CEO & Chief
Investment Officer

*"We are truly active –
delivering the highest levels
of service and performance
is at the core of everything
we do."*

OUR ACTIVE APPROACH

A dynamic and adaptive investment approach focused on your personal objectives, goals and dreams.

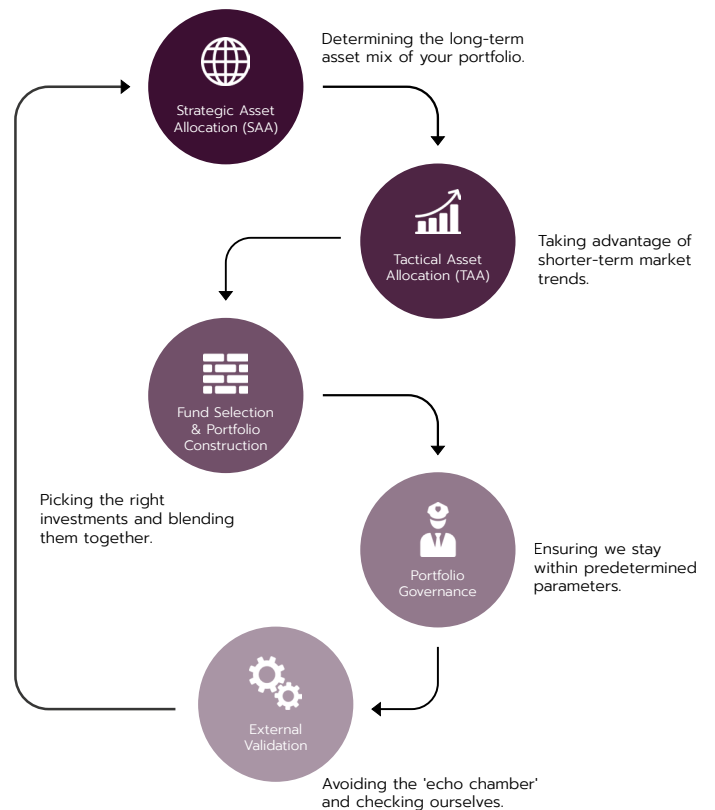
In today's crowded investment market, our Hardy range stands out because of its innovative investment structure and investor-focused approach. Each Hardy Managed Portfolio applies some of the most sophisticated investment strategies available, all within one professionally managed portfolio. It is designed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

True diversification: Owning a Hardy Managed Portfolio is one of the easiest ways to own a well-diversified portfolio. Every investor, no matter the size of their investment, owns a portfolio of multiple underlying funds - spanning asset classes such as shares, bonds, and cash - each 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

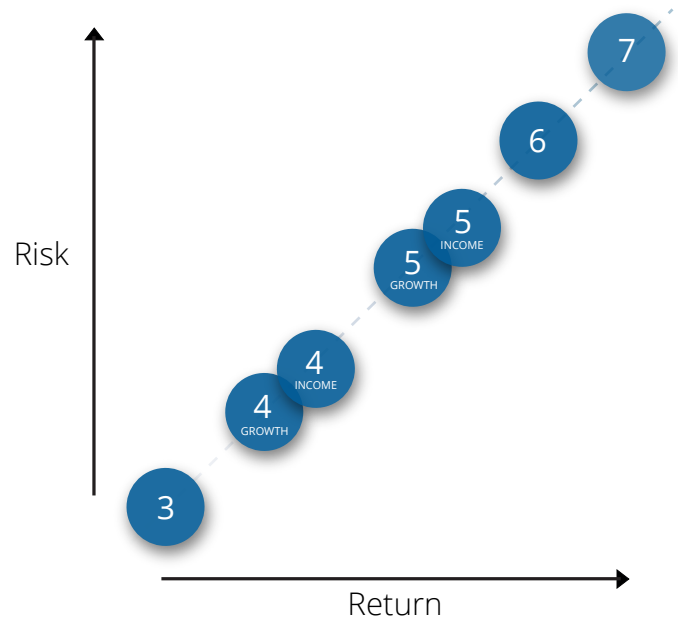
We understand the importance of creating portfolios built to withstand difficult conditions. It's why we call our seven managed portfolios the 'Hardy' range. Our Hardy Managed Portfolios give you instant access to a wide range of high-quality funds, managed by some of the world's leading fund managers,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

Our seven risk-rated portfolios are made up of five growth portfolios and two income portfolios, as illustrated in the right-hand chart.



CONTACT US

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Important information

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Details of our authorisation are available on the FCA register under firm reference number 727583;

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Brochure Version: 2021-094