





## RISK MANAGEMENT

The pillars of TAM's investment management are risk and volatility. Aside from long term performance, fund selection and ease of doing business, TAM aims to deliver you a portfolio that not only consistently outperforms its benchmark, but also achieves this with a volatility below that of both its benchmark and its competitors. This commitment puts TAM into the top quartile of DFMs when it comes to risk management.

### Why is risk important

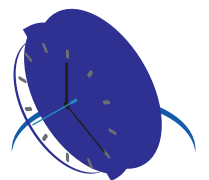
Knowing that your chosen risk profile is set in stone is critical to ongoing suitability needs. Even in a major bull market, to TAM, a balanced portfolio will always remain balanced (c50 equities and c50 bonds and alternatives). TAM deviates only within controlled bounds. Of course, if you'd like more risk, TAM has increased risk portfolio options to suit you, but each model has a clear and dependable set of rules on risk which they won't stray from. In a world full of volatility, TAM remains a safe pair of hands for all market environments.

## VALUE FOR MONEY

It's clear that "value for money" within financial services is recognised as the level of service one receives for the price one pays. Our industry research has shown that in some providers' pursuits of delivering value for money, many clients are exposed to an overreliance on index tracking ETFs as a substitute to expert fund managers. We, however, exist at the intersection between the best levels of active management for the price of a passive investment product.

### How do we achieve this?

We achieve this by investing into some of the best and most innovative funds that the wider market has never heard of. Our goal is to move you away from a reliance on big index funds and instead source pioneering funds with unique approaches to investing. In doing this, we can often negotiate access into these funds at steep discounts on AMCs, which many other DFMs cannot achieve. Overlay this with a strong commitment to active management, impact and sustainability, and your portfolio is positioned at the attractive intersection of cost vs. service, delivering the highest possible service and performance for the lowest possible charges.



ASSET  
MANAGEMENT

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