

WHY TAM ENHANCED PASSIVE?

Our Enhanced Passive service has been developed with our expert fund and exchange traded fund (ETF) research capabilities. The risk-graded model portfolios comprise a blend of active management and “best in class” passive and enhanced passive investments. As a result, you benefit from increased diversification via the alternatives market, superior volatility management and capital preservation.



ACTIVE MANAGEMENT

With the markets likely to be more uncertain and volatile than they have been in recent years, you may wish to consider our Enhanced Passive portfolios, which have been designed to outperform.

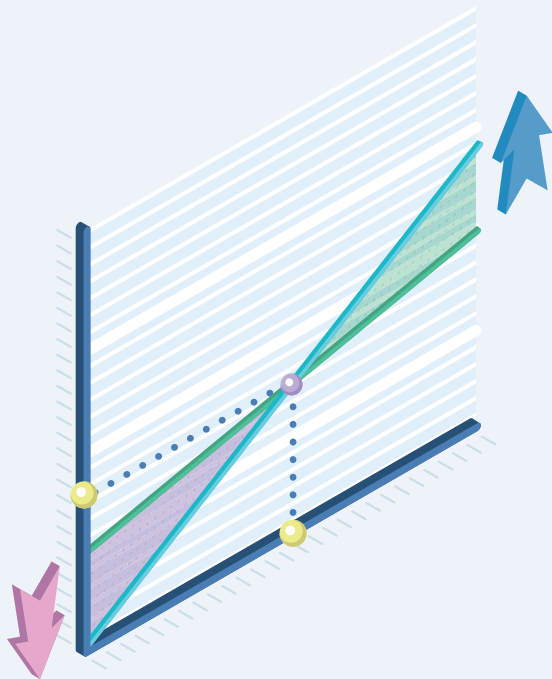
Whilst using a larger provider may have a strong long-term track record, the sheer size and scale of their portfolios can result in the range lacking the agility to meet this rapidly changing market head on. This could compromise their ability to deliver the levels of protection, optimisation, and active management that you are looking for.

MORE THAN EQUITIES AND BONDS

Our Enhanced Passive portfolios benefit from the research capabilities of our fully active portfolio management to delve into the best opportunities from across the full alternatives suite, such as commodities (baskets and specifics), precious metals, infrastructure, and property to name a few. The entire equity and bond ETF market is also analysed to uncover enhanced strategies that deliver significant outperformance over a standard index tracking ETF.

Larger providers may be restricted to using the passive ETF investment products managed in house, which is a potential significant barrier to using “best in class” investments to optimise your investment position and, importantly, manage risk and volatility.





THE LOW VOLATILITY OPTION

Our Enhanced Passive portfolios performed resiliently during the 2022 market volatility because of their active management, diversification, and tactical use of enhanced passive ETFs. The active management element of the strategy was instrumental in avoiding some of the market's traps in 2022. This resulted in a smoother return profile, lower volatility, and significantly improved capital preservation qualities, which proved to be critical to clients.

The delivery of diversification and capital preservation by larger providers could be inhibited by virtue of their size and scale, combined with less active management. Whilst traditional passive strategies could achieve results and positive performance during long straight bull markets, they will inevitably suffer in times when your portfolio needs to quickly adapt to the changing environment. In this respect, our Enhanced Passive portfolios could be a much more efficient investment vehicle for minimising downside risk and preserving capital.

TAKING CONTROL

Our core strategic asset allocation, which governs the top-down investment direction for your portfolio, is derived from Amber River's group strategic asset allocation provided by Redington. In this respect, we will incorporate yours and your adviser's expectations into our own award-winning investment models.

Larger providers will likely have many layers of management and decision makers. Individual institutions invested into their strategies will therefore likely have little to no sway on direction, investment techniques or positioning.

Our commitment to engaging with investors on our Enhanced Passive portfolios will enable a much deeper level of information sharing between you, your adviser and the fund manager, which larger managers may struggle to match due to their size and scale.



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