

# MANAGED PORTFOLIO SERVICE

## SUSTAINABLE FUTURE CAUTIOUS -

Platform-based Managed Portfolio Service

### Market and portfolio review

### Portfolio information

- Launch date:.....
- Initial charge:.....
- Investment management fee:.....
- Ongoing charges figure (OCF):.....
- Transactional costs:.....
- Ancillary costs:.....
- Portfolio yield:.....
- Re-balancing strategy:.....
- Platform availability:.....



### Historical performance

	Rolling					Calendar year					From inception
	1m	3m	6m	1yr	3yr	2019	2020	2021	2022	2023 to date	
SF Cautious											

### Investment objective

## Asset allocation

■ Equities.....	■ Alternatives.....
United Kingdom.....	Clean Energy.....
Global.....	Mixed Assets.....
■ Bonds.....	Property & Infrastructure.....
Global.....	■ Cash.....
United Kingdom.....	

## Top ten holdings

1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

## Vintage Asset Management

Vintage Asset Management (VAM) is an independent and boutique discretionary fund management company which was established in 2008. We provide bespoke portfolio management for private clients, companies and trusts advised by financial intermediaries for whom we offer a model-based Managed Portfolio Service on a number of platforms.

This active service comprises a range of strategies for Cautious, Cautious Balanced, Balanced, Balanced Growth and Growth mandates as well as a Balanced Income offering. Our investment philosophy aims to achieve a steady return for clients whilst maintaining a focus on capital preservation.

VAM is authorised and regulated by the Financial Conduct Authority (FCA) with number 489408 for investment business in the UK only. More information about VAM's business and investment services can be found on our website, or please feel free to contact a member of the team.

## Investment team

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