

# Alpha Beta PARTNERS



**ActiveManagement**  
at Competitive Prices

[www.alphabetapartners.co.uk](http://www.alphabetapartners.co.uk)



## About Alpha Beta Partners

We are a multi-asset manager located in London, dedicated to the financial adviser and intermediary market.

### **We specialise in investment management.**

Our sole focus is to preserve and enhance your real wealth over time, in line with your own investment objectives, and agreed level of risk through the active management of multi-asset, diversified portfolios. As investment specialists, we do not offer financial planning services or financial advice and leave that to your financial adviser.

In addition, we do not have any in-house funds or products which could compromise the impartiality of our services.

### **Alpha Beta Partners – working with your financial adviser, for your benefit.**

Your financial adviser will work with you to select an Alpha Beta portfolio that meets your needs and objectives that are consistent with your appetite for risk. Our 'Risk First' approach means that your selected portfolio will align with your stated risk appetite as agreed with your financial adviser.

### **We have a highly qualified and experienced investment team.**

Our investment team benefits from broad and deep investment market knowledge - harnessing over 100 years' combined experience. We bring institutional quality investment disciplines and techniques to the world of model portfolio management.

**Technology enabled:** We use the latest financial technology to help analyse the investment markets. We then apply modern portfolio management techniques, combined with a wealth of experience. This blend of experience, judgment and technology is rare in today's model portfolio market place.

**Cost efficient:** We have designed our Model Portfolio solutions to provide outstanding value for money that can be passed on to clients via their financial adviser.





## Our investment philosophy.

Our starting point is to understand the key drivers of economic growth around the world and to project a forward view, rather than simply looking backwards to the past. Our active investment approach encompasses rigorous asset allocation which will adapt to market conditions over time. Portfolios are monitored constantly to ensure their performance meets our expectations and that risks are understood and well managed.

### At the core of our investment philosophy are these principles:

- A diversified approach to asset allocation and a focus upon liquidity.
- Thorough research leading to the identification of investment strategies which when blended, provide attractive returns designed to meet your financial plan as agreed with your financial adviser.
- Dynamic asset allocation and a truly global approach to investment.
- Risk management to identify and help avoid the impact of market downturns and to consistently align with your stated risk appetite that you will have agreed with your financial adviser.

## Asset Allocation

Research indicates that achieving the correct asset allocation is the most important factor in generating long-term returns, and that diversification is the best way to achieve risk-adjusted target returns.

By managing multi-asset portfolios, our role is to constantly determine the appropriate blend of asset classes. This is termed a 'multi-asset class' approach, based upon the rationale that in most market conditions at least some components of a portfolio should be delivering positive returns. However, it should be noted that in extreme market conditions, especially when market liquidity is low, some asset classes can display characteristics that follow the overall market.

## What is the Alpha Beta Model Portfolio Service?

Through partnership with your financial adviser, you have access to Alpha Beta's range of portfolios. The portfolios have been built around a single core investor proposition: to preserve and enhance the real value of your assets.

Your financial adviser will work with you to ensure you select the most appropriate portfolio to suit your individual objectives.

## What choice of portfolios does Alpha Beta offer?

**We offer two different types of Wealth Accumulation portfolio plus an Income portfolio:**

**Core Portfolios** – 6 Risk Rated portfolios - Invest in solely passive instruments: Index Funds and Exchange Traded Funds (ETF's).

**Core Plus Portfolios** – 6 Risk Rated portfolios - Invest predominantly in passive instruments with a blend of active funds.

**Alpha Beta Balanced Income Portfolio** - The Portfolio's investment objective is to achieve a combination of income yield and capital appreciation by deploying a globally focused multi-asset strategy. The portfolio will gain this exposure through collective investment schemes and ETF's where required.



## In a nutshell

### The benefits of the Alpha Beta Model Portfolio Service

- Access to a range of managed portfolios each aligned to a specific investment objective and attitude to risk
- Investment expertise – offering competitive access to our expert investment management across a broad range of strategies
- Institutional quality investment processes rarely available to the retail client
- Liquidity – the ability and flexibility to change/sell at any time
- Attractive ‘overall cost’ relative to the market

### Important information:

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