



growth
85

31 Mar 2024



Strategy Name

Growth Adventurous

Inception date

01/07/2023

Wrappers

GIA, ISA & SIPP

On or Off Platform

On

Base Currency

GBP

VAT on Fees

No

Management Fee

0.15%

OCF of funds

0.39%

Transaction Cost of Funds

0.10%

Management Team



Tomiko Evans
Chief Investment Officer

Mike Buckle
Investment Manager

Investment Objective

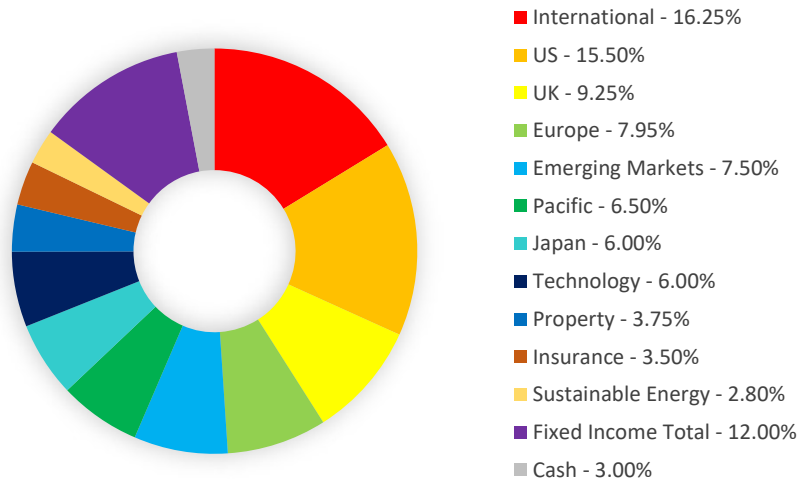
The Growth Adventurous Portfolio is a growth strategy which invests in a globally diversified range of leading active and low-cost passive funds. It is aimed at medium to long-term investors who are seeking capital growth from an adventurous portfolio of diversified investments.

The equity element of this portfolio will not exceed 85%.

The chosen funds can invest in UK and overseas equities, commercial property, fixed interest securities, natural resources, precious metals or cash.

The Growth Adventurous Portfolio is benchmarked against the average performance of the IA Mixed Investment 40-85% equity sector.

Asset Allocation Breakdown



Platform Availability





IMPORTANT INFORMATION

The Crossing Point Portfolio Management Service is only available to investors who use the ongoing services of a financial adviser. For information purposes only, please contact a personal financial adviser for further information.

Independent financial advisers take no responsibility for the underlying investment strategy, the investment process and selected funds are the responsibility of Crossing Point Investment Managements' Discretionary Fund Managers. By the nature of discretionary fund management, holdings will be bought and sold, but the investment manager will not seek your permission to do this. Investment decisions will be the responsibility of the Discretionary Fund Manager.

Calculation of the fund OCFs shown is provided by FE Fundinfo. This charge may vary across the various platforms where the portfolios are available. Please refer to your investment adviser for details.

Performance Calculation: Performance is quoted on an annualised basis and calculated through Morningstar Direct. The performance calculations are provided for illustrative purposes only and should not be viewed as the performance of a specific client account. Performance is shown inclusive of ongoing fund charges but gross of transaction, platform, IFA, incidental, and Crossing Point's investment management charge. Deductions for these charges will have the result of reducing the illustrated performance.

Past performance is not a guide to future performance. The value of investments and any income from them can fall and you may get back less than you invested. If you invest in currencies other than your own, fluctuations in currency value will mean that the value of your investment will move independently of the underlying asset. The information contained in this documentation has been taken from sources stated and is believed to be reliable and accurate, but without further investigation cannot be warranted as to accuracy or completeness. Tax concessions are not guaranteed and may be changed at any time, their value will depend on individual circumstances.

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