

How Square Mile create your portfolio



Friarsgate
Financial
Planning

No matter what your financial plan, Friarsgate Financial Planning Ltd will take the time to understand where you are trying to get to and the journey that you are happy to take to get there.

This plays an important part in the construction of your investment portfolio. For example, if you are a cautious investor, the ups and downs of a journey that an adventurous portfolio could take you on might be somewhat uncomfortable.

In building portfolios, there are three key things they consider:

- Which markets to invest in
- What type of assets should be included
- Which funds to buy

Today's investors can access any global investment market, from developed economies such as the US, the UK and Germany to the emerging markets of Brazil, Russia, India and China. Each of them provides different opportunities and risk, including for many the additional risk of having to exchange sterling for a potential host of different currencies.

Choosing what type of assets to include is equally important. Do you want to invest in gilts (government borrowing), corporate bonds (company borrowing), equities (shares in companies), commercial property, cash or any other asset type?

It is Square Mile's job to understand these markets and their relative opportunities – and indeed the risks – and select assets that are suitable for different types of investor.

1 Decide on the right mix:
first off, they analyse the overall ratio of shares, bonds, property, cash and other investments that is best to help meet your chosen outcome

2 Get the right ingredients:
they then research which funds in the marketplace should be used to fill in the share, bond, property and other sections of your portfolio

4 Continually check.
Their job is never finished: They keep checking everything is just as it should be and recommend changes to the portfolio as and when they are needed

3 Blend it together:
then they work out exactly which proportion should be invested in each individual fund and how to combine them to get the right outcome for you

**Steps
Square Mile
go through to
create your
portfolio**

The range of portfolios



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Square Mile's focus in undertaking any fund research is to determine whether a fund's stated objective is appropriate for inclusion with their portfolio, and then to consider whether the Fund Manager can consistently deliver that stated objective over the long term.

Square Mile aim to give peace of mind that the funds selected as part of the constructed portfolios provide the best opportunities to meet your financial goals. They assist us in building investment solutions that meet these needs and to provide an on-going service that is truly valued by you.

Their research is focused on 3 specific outcomes:

- Capital Accumulation
- Income
- Capital Preservation

Square Mile assign the suitability of each outcome depending on your financial goal.

	Outcome	Suitability
	Capital Accumulation	For investors who are building up their savings.
	Income	For investors who are seeking income from their investments
	Capital Preservation	For investors seeing to preserve their capital in real or absolute returns

Past performance is not a guide to future returns and the value of capital invested and any income generated from it may fluctuate in value.

Want to know more?

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For more information on Square Mile
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