

PACIFIC MPS SOLUTIONS

**CORE GROWTH PORTFOLIOS**

A modern dynamic investment solution

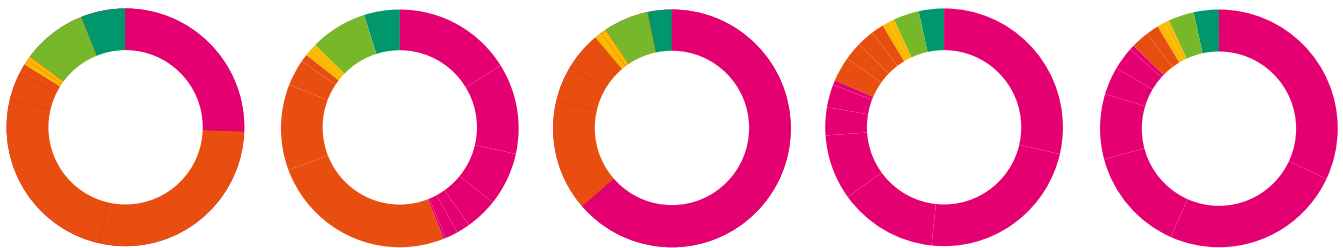
**INTRODUCTION**

The Pacific Asset Management (PAM) Core Growth Range consists of five highly diversified multi-asset class portfolios designed to meet a range of client investment objectives.

**About the Core Growth Portfolios**

The range is fully diversified across: Asset Class, Geography, Currency and Factor. Each portfolio carefully blends a mix of five broad asset classes: Equities, Fixed income, Alternatives, Diversifying Assets and Cash. By adjusting this mix, our portfolios cater for a range of investment goals and risk appetites.

**MULTI-ASSET SOLUTIONS FOR VARYING RISK TOLERANCE**



● Equity ● Fixed Income ● Alternatives ● Diversifying Assets ● Cash

**DEFENSIVE**

The Defensive Portfolio aims to generate stable investment returns over the long term, with a focus on capital preservation. It seeks to protect against the erosive effects of inflation.

**CONSERVATIVE**

The Conservative Portfolio aims to generate steady long term returns. This portfolio has a moderate growth profile whilst maintaining a cautious investment approach.

**BALANCED**

The Balanced Portfolio allocates across all asset classes blending both defensive and growth focused assets. Investors in this category have a moderate tolerance for risk.

**ADVENTUROUS**

The Adventurous Portfolio targets capital growth and would suit investors who accept a higher degree of risk. The portfolio holds a significant equity allocation.

**AGGRESSIVE**

This portfolio is designed to be suitable for an aggressive investor who is willing to accept a much higher level of risk in return for the potential of higher returns in the longer term.



**CLIENT BENEFITS**



**INSTITUTIONAL INVESTMENT EXPERTISE**

Investment team with 50+ years combined industry experience across multi-asset, equities, fixed income, absolute return and sustainable investing.



**ACTIVE INVESTMENT MANAGEMENT**

Optimised portfolio re-balancing ensuring clients benefit from efficiencies of discretionary management.



**COST EFFICIENCY**

Blended solutions which invest across the breadth of the asset management space: Passive, Active, Factor, Direct securities.



**MODERN PORTFOLIO APPROACH**

Efficient portfolios combining the benefits of 'unitised' multi-asset investing within a model portfolio structure.



Source: Pacific Asset Management. Strategy holdings and allocations are subject to change. Totals may not sum to 100% due to rounding.

The Pacific Core Growth Portfolios combine two complementary investment styles specifically designed to work with each other

# 50% Efficient

The Efficient part of the portfolio has been designed by Pacific to capture market-based returns by investing across a variety of low cost tracker funds. These tracker funds are diversified by asset class and region, based on extensive analysis of historic market data. This simple, but intelligent approach built by Pacific accounts for 50% of the overall portfolio.

✓	Risk Profiled	✓
✓	Multi-Asset	✓
✓	Cost Efficient	✓
✓	Smart Rebalancing	✓
	Continuous Rebalancing	✓
✓	Passively Managed	✓
	Actively Managed	✓
	Active Asset Allocation Tilts	✓
	Active Funds	✓
	Direct Securities	✓
✓	Tracker Funds	✓

# 50% Dynamic

The Dynamic part of the portfolio is a liquid, highly diversified, forward looking overlay strategy accessed through the corresponding Pacific Multi-Asset Accumulator fund. The asset allocation of the fund is actively managed and continually adjusting to navigate the prevailing market conditions. The overlay provides diversified access to a blend of active, passive, factor strategies as well as direct securities, the composition of which will change over time as opportunities arise. This portfolio accounts for 50% of the remaining overall portfolio.

- ✓ Capturing market-based returns using 7 index tracking funds
- ✓ 2 Asset Classes
- ✓ 7 Sub Asset Classes
- ✓ 100% Passive Tracker Funds



- Forward looking overlay ✓
- 5 Asset Classes ✓
- 18 Sub Asset Classes ✓
- c.35 Underlying holdings ✓
- Including Active, Passive, Factor and Direct Securities ✓

Defensive      Conservative      Balanced      Adventurous      Aggressive

## PLEASE GET IN TOUCH



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## 5 STAR DEFAQTO RATED

Pacific Asset Management has received the highest possible rating from Defaqto for 2021, meaning it is considered to be one of the highest quality MPS offerings on the market.



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