

Blackfinch

Adapt AIM Portfolios

Reasons Why



Two Investment Options Available

Investors can choose from income and growth options. The Growth Portfolio invests in companies with strong return potential over the medium to long term. The Income Portfolio focuses on companies with attractive dividend yields, and investors can choose to draw a defined income or to receive income payments on a quarterly basis.



Low Charges

We're committed to providing investors with value for money, by offering competitive fee structures and some of the best value charging structures in the market. For example, investors pay no initial charge on their investment, and our annual management charge (AMC) is just 1.5% plus VAT. We apply a Dealing Fee of up to 1% of the investment plus fixed settlement costs for direct clients.



Full ESG Overlay

We incorporate Environmental, Social and Governance (ESG) considerations into the investment analysis and decision-making processes for our Adapt AIM Portfolios, and we use RepRisk to continuously monitor any ESG events related to any of our portfolio companies that might affect the sustainability of their business models.



Diversification

We have a unique partnership with smaller company specialists Chelverton Asset Management, which is exclusive to our portfolios. Working together, we ensure strong stock selection. The resulting portfolios invest in established and growing UK businesses while ensuring a high level of diversification.



ISA Wrapper Available

Investors can choose to hold their Adapt AIM investments in an ISA tax wrapper. This means clients get all the tax benefits of an ISA, alongside IHT mitigation and the return potential of investing in AIM-listed companies. Clients can use the Adapt AIM Portfolios for new ISA investments or existing ISA transfers.



Availability

The Adapt AIM portfolios are currently available via Standard Life, Transact, Ascentric, Platform One, Fidelity FundsNetwork, Succession Investment, Embark and 7IM platforms. For investments placed via these platforms, the platform will provide custody of the assets.



Low Minimum Investment

The minimum subscription is £15,000. This is also the minimum that a client must have invested ahead of making any additions to a portfolio.



Award Winning

Blackfinch was awarded Best BR Manager (Listed) at the Intelligent Partnership Growth Investor Awards 2020.

IMPORTANT INFORMATION

Capital at Risk. This Information is Issued by Blackfinch Investments Limited which is authorised and regulated by the Financial Conduct Authority (FCA Number 153860). Registered Address: 1350-1360 Montpellier Court, Gloucester Business Park, Gloucester, GL3 4AH. Registered in England and Wales Company Number 02705948. All information correct at November 2023.