



Blackfinch Asset Management

Adaptations Range

The Adaptations multi-asset portfolios are actively managed and globally diversified. They are available in either a unitised fund or MPS structure. All are aligned to Blackfinch’s environmental, social and governance (ESG) investment process. Inflation-linked return targets mean they’re easier for clients to understand. Our portfolios are only available through advisers and on third party platforms.

Read our **Reasons to Partner** document to find out more about our unique approach to working with advisers. As well as helping clients meet their financial objectives, we help advisers meet their business goals by providing a tailored service through our Adaptions Partnership Programme.

PORTFOLIO FEATURES

Portfolio Name	Target Return (rolling 5 year)	Dynamic Planner Rating	Defaqto Rating
Defensive	CPI + 1%	 3	
Cautious	CPI + 2%	 4	
Balanced	CPI + 3%	 5	
Growth	CPI + 4%	 6	
Enhanced Growth	CPI + 5%	 7	
Income	3.5% Annual Yield (net)	 5	

Unsure of whether to use Models or Funds?

Speak to your Blackfinch Asset Management Business Development Manager for more information.

IMPORTANT INFORMATION

Capital at Risk. Blackfinch Asset Management Limited is an Appointed Representative of Blackfinch Investments Limited which is authorised and regulated by the Financial Conduct Authority. Registered address: 1350–1360 Montpellier Court, Gloucester Business Park, Gloucester, GL3 4AH. Registered in England and Wales company number 11639647. The Blackfinch Asset Management Portfolios are actively managed by Blackfinch Investments Limited. Blackfinch Asset Management Limited act as the promoter and distributor of the model portfolios.

ADVISER BENEFITS

Risk reduction: Comprehensive screening and investment selection process

ESG Focused: Entire range benefits from our internal and external ESG screening process

Inflation-linked returns: Ensure relevant, relatable and clear performance targets for clients

Business efficiency: Target returns measured by inflation help with cash-flow forecasting

Placing advisers front and centre: All literature can be co-branded or white-labelled

Flexible Approach: Portfolios available as MPS models and unitised funds

CLIENT BENEFITS

Active management: Daily monitoring to capture upside potential and protect capital

Clear objectives: Targeting inflation-linked returns, relevant and understandable

Risk management: Through regulated, globally diversified, multi-asset investments

Wide-ranging availability: Can be held within a range of tax-efficient wrappers and GIAs with no minimum investment amounts

Liquidity: Fully liquid portfolios

ESG Focused: Reassurance that their investment is aiming for a positive impact

