



Casterbridge

Hardy Managed Portfolios

INVESTOR BROCHURE

INTRODUCTION

Investing — on your terms

What does investing mean to you? For most people, investing is a way to set aside something today so you can live the life you want tomorrow.

Of course, every investment comes with a degree of risk. Nothing ventured nothing gained, as they say. But choosing the right investment manager, one that understands what matters to you, can take some of the worry out of it and leave you feeling confident about what the future holds.

At Casterbridge, we've spent the last decade working hard for our clients, by building investment portfolios

that make their money work harder. And we understand the importance of creating portfolios built to withstand difficult conditions. It's why we call our managed portfolios the 'Hardy' range.

So, whether you're after long-term growth, regular income or a combination of the two, a Hardy portfolio will feature carefully-chosen assets designed to meet your investment objectives, giving you the time and space to live the life you want.



Our Hardy range

The Hardy Managed Portfolio range features seven different risk-targeted investment profiles built to meet the demands of today's investment markets.

Each profile contains a carefully chosen selection of high-quality funds, managed by some of the world's most capable fund managers, and includes a blend of both active and passive investments spread across different asset classes.

The investments are chosen by our in-house research team and managed day-in, day-out by experienced managers and analysts who really know their stuff, so you

don't have to. We are free to invest based on where our experience, research, and insights take us, not where our competitors are.

Our approach gives you a portfolio greater than the sum of its parts, capable of delivering the best possible investment returns without taking too many risks. It's what active portfolio management ought to be.

As with any investment, you could lose money and get back less than you originally invested.



ACTIVE PORTFOLIO MANAGEMENT

Focused on your wealth journey

Active management means we will assemble and then manage a diversified portfolio of investments on your behalf, spread across different asset classes, sectors and regions. These take into account such aspects as your investment objectives and your attitude towards risk. Each Hardy Managed Portfolio is built to make sure your investment stays within your comfort zone.

Your portfolio will feature a selection of underlying funds, featuring different asset classes such as shares, bonds and cash, managed by some of the world's most experienced fund managers. Being part of the Hardy range means owning these funds costs less than if you built your

own portfolio from the same individual funds.

You don't need to monitor or adjust your investments, we do it all for you. Our experienced investment managers make any necessary adjustments on your behalf, based on decades of market knowledge and investment experience.

You'll receive regular updates and performance reports on how your portfolio is doing, helping you stay informed without being overwhelmed. You can also view your investments securely online 24 hours a day, seven days a week, so you'll never feel out of the loop or left to worry about market ups and downs.

PARTNERSHIP APPROACH

Working with your financial adviser

Our portfolios are only available through your financial adviser, who will help you determine the right Hardy Managed Portfolio based on your own specific circumstances and objectives. We'll then work closely with your financial adviser to make sure we achieve the right investment outcomes for you.



The Casterbridge difference

We're an independent, discretionary fund management business, created to give investors like you greater choice and flexibility, while achieving your long-term financial objectives.



WELL-BUILT INVESTMENT PORTFOLIOS

We will construct a diversified investment portfolio featuring the highest quality investments. You can feel confident your portfolio is focused on achieving your investment goals every single day.



PRINCIPLES-BASED INVESTING

We focus on what matters to you, not on chasing benchmarks or comparing ourselves to peers. This means your portfolio stays aligned with the goals and preferences you discussed with your adviser from the very start.



DYNAMIC APPROACH

Investment markets can change rapidly. Our investment team is able to respond quickly, making key decisions on your behalf and finding the best available opportunities.



24-7 PORTFOLIO ACCESS

We'll keep you updated on your progress with regular portfolio reporting, and you can view your investments securely online 24 hours a day, seven days a week.

How Casterbridge works for you

Owning a Hardy Managed Portfolio is one of the simplest ways for you to own a well-managed, well-diversified and cost-efficient investment portfolio. For us, it's about achieving investment excellence while delivering the highest levels of service. But above all, it's about knowing what it takes to make your money work harder for you.



Whether you're after long-term growth, regular income or a combination of both, your portfolio will feature carefully-chosen assets designed to meet your investment objectives.



Being truly impartial means we can select the best-available investments for your portfolio, basing our decisions on quality and suitability.



Our focus on delivering exceptional client service, day-in day-out, means you'll never be left feeling short-changed.

WHO WE ARE

About Casterbridge

Since 2016, we've been working hard to give investors the portfolios they deserve, by combining investment flexibility, exceptional yet cost-effective management, and a total commitment to client service.

We created Casterbridge because we felt people deserve proudly independent, adaptive, and agile investment management. With extensive industry expertise and a passion for delivering better outcomes, we developed a discretionary fund management service that offers greater choice, flexibility, and a more personalised approach. It's investment management as it should be done.




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Casterbridge

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