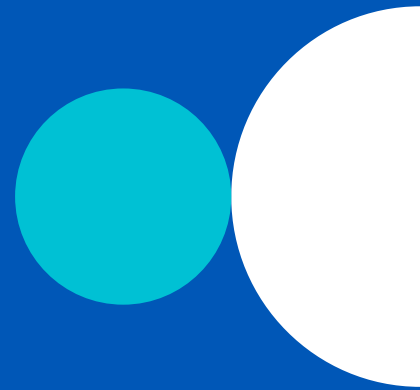




# Discretionary investment management

[abrdn.com](http://abrdn.com)

# Discretionary investment management from abrdrn



**Our purpose is to help clients achieve their investment outcomes and ambitions, whatever they may be, no matter how unique.**

We have a team of investment specialists and a network of resources ready to support clients and their advisers. We have full access to the global research and investment capabilities of abrdrn, which includes the biggest active investment manager in the UK and one of the largest in Europe.

## Who we are and what we do

We create portfolios to meet clients' needs; and have an outcome-focused investment philosophy.

We understand that when clients entrust their wealth to us, it is ultimately their aspirations that we are working to achieve.

That could be:



growing assets for future income in retirement



supporting grandchildren onto the property ladder



achieving charitable aims

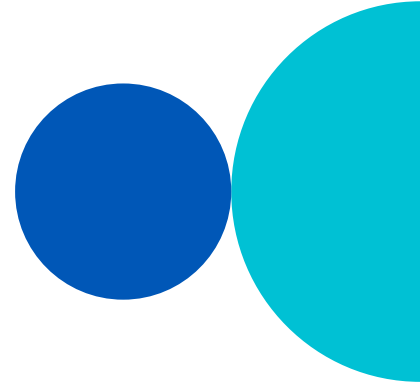


leaving a legacy for the next generation



a combination of different goals.

We are able to build portfolios that aim to deliver the specific outcomes clients desire.



## How we do it

Our focus is to grow and preserve clients' wealth and get them the results they desire through our range of outcome-focused solutions. We have the people and processes in place to best achieve that. Powered by a culture of investment excellence, we deliver these solutions with the very highest standards of service that discerning clients would expect.

### Investment excellence

The world is constantly changing and clients' needs are undoubtedly more sophisticated than ever before. To help navigate this complex environment, our investment approach is robust and dynamic. It is underpinned by three key principles.

- **Client driven, outcome orientated** – Helping clients' achieve their desired investment outcomes drives everything we do. Our solutions are specifically aligned to their need for income, growth or both. We can also offer options that help provide some insulation from the worst of the market's volatility, and can accommodate ethical considerations. Our aim is to always stay relevant to their needs – today and in the future.
- **Active and forward thinking** – We take an active and research-intensive approach, focused on identifying the drivers of change in the investments we hold. This depth of insight provides an information advantage with which we aim to generate better performance – ultimately growing clients' wealth more intelligently. We are innovative in our approach and are continually developing ways to deliver next-generation investment solutions to clients.
- **Global reach** – By actively investing on a global basis and across asset classes, we believe we can offer clients the best opportunity to increase their wealth, consistently and over the long term.

As well as our own in-house expertise, we have extensive resources at our disposal through the global footprint of abrdn. This global reach enables us to identify diverse investment ideas across the world and provides access to the institutional investment capabilities and research of the wider business.

## Incorporating ESG, Bespoke Ethical Solutions and Impact Investing

We understand that clients may wish to reflect their beliefs and values in the investments they hold. We have a clear focus on responsible investment and by incorporating environmental, social and governance (ESG) factors in our investment process, we are more effectively able to understand key risks and assess quality of all investment decisions, ethically labelled or not.

We believe that investing with responsibility goes to the heart of seeking superior returns for our clients.

Moreover, we believe that active engagement with the companies we invest in helps to improve long-term, sustainable investment returns.

As well as embedding ESG in our investment process, we have the ability to provide further bespoke enhancements. We can apply values-based screening to directly invested portfolios, for those clients who wish to reflect their principles or beliefs in their investments. In addition, we offer a global impact solution that is designed to contribute to the UN's 17 Sustainable Development Goals that form their 2030 agenda. This is an ambitious set of targets to address the world's biggest issues associated with climate change, rising inequalities and unsustainable production and consumption.

# Solutions for all, expertly managed

## We offer an extensive range of investment solutions that are built around clients' desired outcomes and tolerance for risk.

**They are flexible enough to address their requirements now and as their circumstances change.**

We can help with clients' needs for income, growth and preservation of wealth, and also provide options that may offer some insulation when markets are volatile. Each solution aims to deliver the best possible outcome, at each and every step of a client's investment journey, through the saving and spending phases.

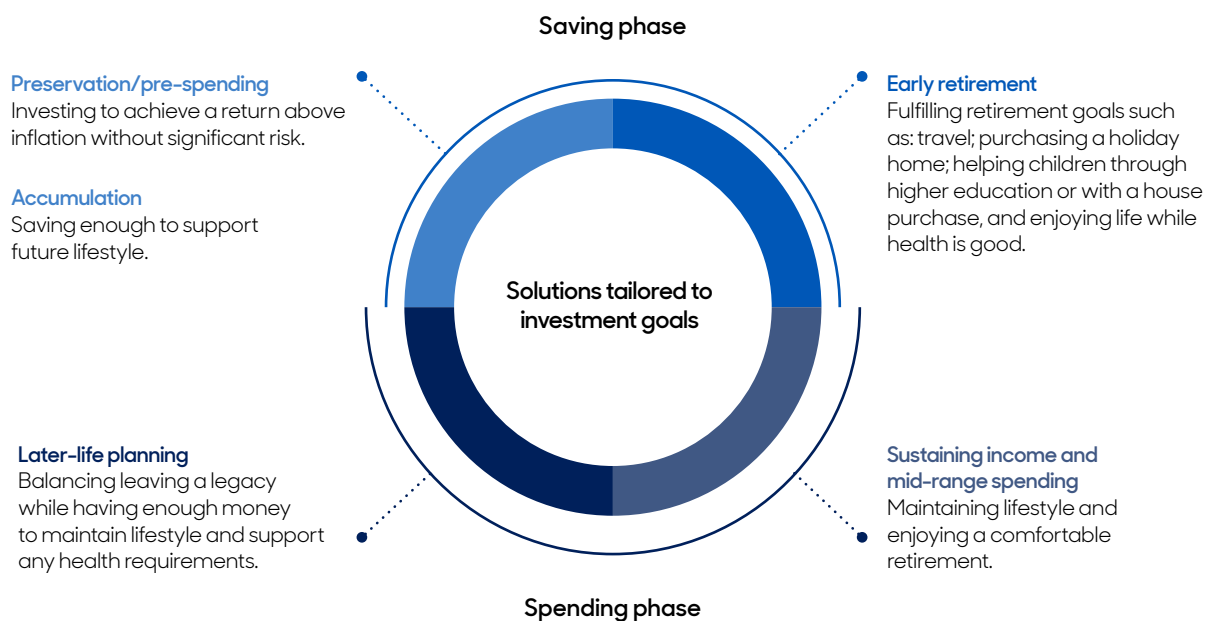
### Solutions tailored to investment goals

**Every client's needs are unique, usually multi-faceted and often complex.**

Our suite of solutions aims to address each and all of these issues and includes:

- a range of risk profiles that can address clients' needs whatever their risk tolerance

- the flexibility to manage your assets within a pooled fund or a segregated portfolio, or a mix of both
- traditional solutions that leverage our ability to invest in a global universe of companies
- volatility-managed solutions that target specific investment returns
- solutions that seek to generate growth or income, by investing in a combination of traditional and alternative assets, whilst offering a degree of protection from market falls
- values-based screening for clients who wish to reflect specific ethical concerns.



As with any form of investing, the value of investments, and the income from them, can go down as well as up and an investor may get back less than the amount invested. Past performance is not a guide to future results.

## Why entrust your assets to us



### Breadth of resource

We have a network of dedicated professionals, ready to provide support and deliver results for clients.



### We are easy to work with

We care about the same things as you.



### We are here for the whole journey

Providing comprehensive and innovative investment solutions tailored to clients' current and future requirements.



### Clear and regular communication

We provide clients with high-quality reporting.



### A strong & supportive group

We have extensive, world-class resources and expertise at our disposal through our investment specialists across abrdn group.



### Our aim is to protect and enhance the value of our clients' investments while contributing to a sustainable world

That is why ESG is embedded in our direct stock selection.

## Our locations

There is always someone close by to provide support when needed. We have investment specialists and a client service team of more than 50, across five offices in the UK and a presence in Jersey.

01

Edinburgh

02

Leeds

03

Birmingham

04

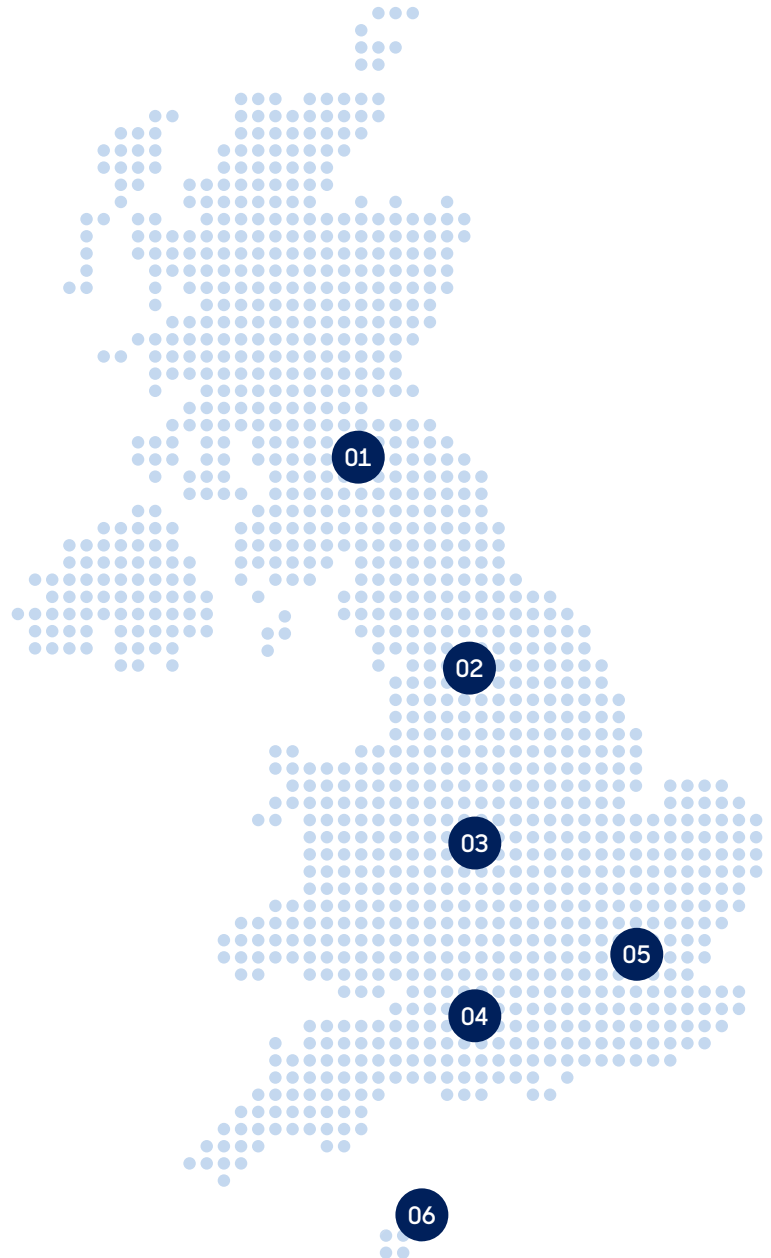
Bristol

05

London

06

Jersey





For more information visit [abrdn.com/discretionary](https://abrdn.com/discretionary)  
or email us at [discretionary@abrdn.com](mailto:discretionary@abrdn.com)

The value of an investment is not guaranteed and can go down as well as up.  
An investor may get back less than they invested.

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