Managed Portfolio Service
Risk Mapping

January 2024

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Managed Portfolio Service (MPS) Risk Mapping

The following mapping is designed to help advisers who use the systems listed below to select the Managed Portfolio Service strategy that is most appropriate to their clients' risk profiles.

abrdn MPS	Dynamic Planner	FinaMetrica Score	Defaqto	ORRA[1]	EValue[2]	Synaptic
abrdn MPS 1	3	28–48	3	2	3	2.1
abrdn MPS 2	4	49–59	4	3	3	2.8
abrdn MPS 3	5	60–70	5	3	4	3.5
abrdn MPS 4	6	71–82	7	4	4	4.3
abrdn MPS 5	7	83–100	8	4	5	5.0

abrdn Sustainable MPS	Dynamic Planner	FinaMetrica Score	Defaqto	ORRA[1]	EValue[2]	Synaptic
Sustainable MPS 1	3	28–48	2	2	3	2.2
Sustainable MPS 2	4	49–59	4	3	3	2.8
Sustainable MPS 3	5	60–70	5	3	4	3.5
Sustainable MPS 4	6	71–82	7	4	4	4.3
Sustainable MPS 5	7	83–100	8	4	5	5.0

abrdn Index MPS	Dynamic Planner	FinaMetrica Score	Defaqto	ORRA[1]	EValue[2]	Synaptic
abrdn Index MPS 1	3	24–46	3	2	3	2.4
abrdn Index MPS 2	4	47–58	4	2	4	2.8
abrdn Index MPS 3	5	59–69	6	3	4	3.5
abrdn Index MPS 4	6	70–81	7	4	5	4.2
abrdn Index MPS 5	7	82–100	9	5	5	5.0

abrdn Sustainable Index MPS	Dynamic Planner	FinaMetrica Score	Defaqto	ORRA[1]	EValue[2]	Synaptic
Sustainable Index MPS 1	3	24–46	3	2	3	2.4
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Sustainable Index MPS 5	7	82–100	9	5	5	5.0

Q4 2023 ratings (based on most up to date information supplied by the various ratings agencies).

[1] ORRA scores based on the 1– 5 Risk band.

[2] Evalue scores based on the Risk Benchmark EV standard 1–5 and on a 5 year time horizon.

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The mapping summarises the relationship between risk ratings and our MPS strategies. It should be noted that most risk questionnaires assess an investor's attitude to risk only. As per FCA guidance investors together with their advisor should also consider other factors such as capacity for loss and investment horizon in their decision making.

The mapping may be subject to future changes dependant on the investment performance or composition of the various MPS Strategies. The full abrdn MPS range of strategies is rated by Oxford Risk, DT Dynamic Planner, Defaqto, Synaptic, E Value and Finametrica.

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