



Carmignac launches UK-model portfolios

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Carmignac has partnered with SimplyBiz to launch the bespoke range of model portfolios, designed specifically for advisers' use. We have also partnered with Hymans Robertson, who have licensed the models to form part of their range of risk-controlled solutions, and RSMR Portfolio Services Limited as our Discretionary Fund Manager.

Striking the right balance: four diversified model portfolios to meet clients' risk appetites

These model portfolios have been designed to cater to the investment objectives and risk appetites of different types of investors – from prudent clients to those willing to take more risk for potentially higher returns.

The core characteristic of Carmignac Risk Controlled MPS portfolios can be summed up by balance. As well as reflecting the culture of our asset management principles, we have conscientiously structured these portfolios to be resilient for the medium and long term – minimising volatility while building consistency.

Across our four Carmignac Risk Controlled MPS portfolios, we have carefully diversified the fund mixes to ensure that active decisions on behalf of our clients are tempered by value-led passive strategies. This way we can maximise stability but not at the expense of hard-fought returns.

Model Portfolio 4



aims to achieve capital growth in excess of the target benchmark (CPI +2% per annum) over the medium to long-term through investment in collective investment funds providing exposure to equities (UK and international), fixed income (government and corporate), property and cash with an overall balance of lower risk and higher risk asset classes.

Model Portfolio 5



aims to achieve capital growth in excess of the target benchmark (CPI +3% per annum) over the medium to long-term through investment in collective investment funds providing exposure to equities (UK and international), fixed income (government and corporate), property and cash with a slight bias overall towards higher risk asset classes.

Model Portfolio 6



aims to achieve capital growth in excess of the target benchmark (CPI +3.5% per annum) over the medium to long-term through investment in collective investment funds providing exposure to equities (UK and international), fixed income (government and corporate), property and cash with an overall bias towards higher risk asset classes.

Model Portfolio 7



aims to achieve capital growth in excess of the target benchmark (CPI +4% per annum) over the medium to long-term through investment in collective investment funds providing exposure to equities (UK and international), fixed income (government and corporate), property and cash with a distinct bias overall towards higher risk asset classes.



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In building these, Carmignac has applied an active approach to ensure clients' objectives are front of mind, while meeting strict pricing constraints – all under independent oversight from the risk consulting firm, Hymans Robertson.

We believe this is a unique, tailored solution that's rare to find in the market –with each portfolio combining respected external funds as well as Carmignac's own to draw attractive results from the market. As responsible and sustainable investment practice is a central expectation of most investors today, Carmignac uses strict ESG metrics to ensure that the investments they pick meet high social and governance standards.

Brochure

Model Portfolios to meet Individuals' investment objectives

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