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July 2019

Investment Review



Introduction

With a new prime minister, we face a new period of uncertainty as we move towards the October deadline set for Brexit. In circumstances such as this ordinarily, we would not recommend making any knee-jerk changes to our client's investment portfolios but of course we will continue to watch things carefully.



Investment Solutions



During the last few months we have been working on the composition of new very much lower cost investment solutions for our invested clients.

During the last quarter of this year we will be contacting clients and making suggestions as to how these cost efficiencies can be implemented.

Our discussions have involved new commercial terms with product providers and investment managers alike.



During September we hope to release a small series of very short videos detailing the work that we aim to do with individual clients.

We will ask clients to contact their advisors so that appointments can be made to detail the changes.



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As part of this process your advice I will discuss with you the continued suitability of the investment products that you have in use.

This will involve discussing with you your capacity for loss and your investment risk profile. We have significantly reduced the complexity around making decisions in connection with investment risk and hope that this leads to a greater and more detailed understanding of risk opportunity.



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It may be that you are currently in discussion with your advisor and this being the case, this new offering will be part of those current discussions.



Conclusion

As stated at the beginning of this very short interim investment review, we do not think that there is anything that we need to do to investment portfolios to try and guess the position of markets.

Clearly, we have all enjoyed some buoyancy in our investments in the last few weeks and there is no clear indicator that this should in the long term, beyond done.



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We will of course continue to monitor the situation. If you have any questions, then please do not hesitate to contact your advisor or the office.

We will be in touch during September with regard to these changes which form the focus of our vision for 2020.

As usual our contact details appear on the final slide for ease of reference



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Keeping in touch

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