



BOWMORE ASSET MANAGEMENT

MPS ESG Risk Profile 6

March 2026



**ACTIVE
MANAGEMENT**



**GLOBAL
ORIENTATION**



**LONG TERM
HORIZON**



**HIGH
CONVICTION**



**WEALTH
PRESERVATION**

**RISK
SCALE**

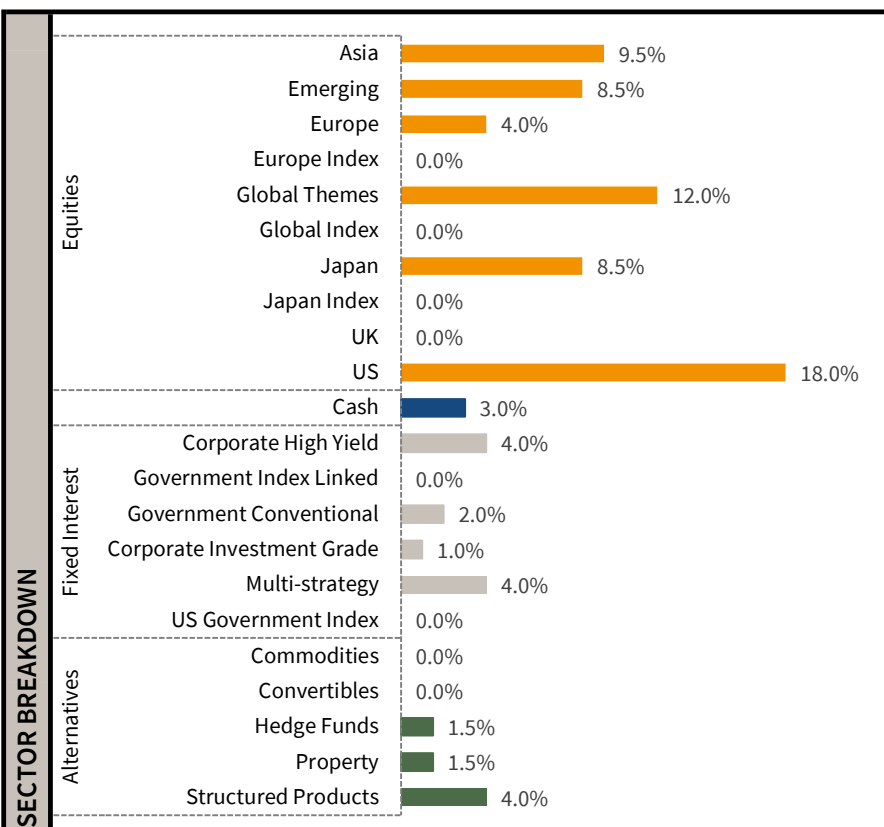


RISK PROFILE OVERVIEW

The objective of the portfolio is to achieve capital growth significantly greater than inflation. The portfolio has been constructed using ESG principles, ensuring that ESG criteria have been considered when selecting the underlying investments. Typically, the majority of the portfolio will be invested in equities (but no more than 90%), with the rest invested in other risk assets with a small allocation to defensive assets. The portfolio is expected to exhibit high levels of volatility.

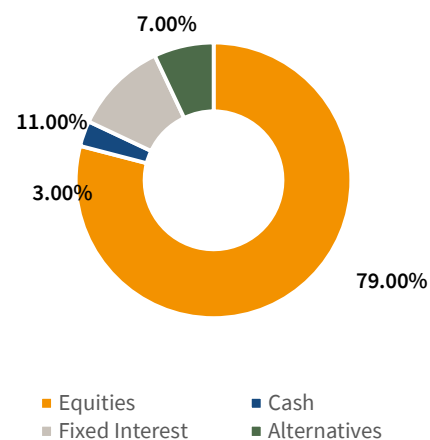
HEADLINE HOLDINGS

- iShares ESG US Equity
- Royal London Sust Leaders
- Invesco Monthly Income Plus
- iShares UK Gilts Index
- AHFM Defined Returns
- Premier Miton Eur Prop



PORTFOLIO COMPOSITION

The range of exposure to different asset classes may vary.



RANGE OF EXPOSURE

	Lower	Upper
Equities	70.0%	90.0%
Fixed Interest	0.0%	20.0%
Alternatives	0.0%	10.0%

FOR FURTHER INFORMATION



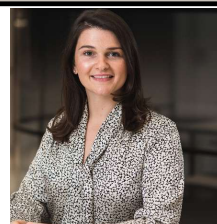
Jonathan Webster-Smith
Chief Investment Officer



James Woodman
Investment Director



Callum Taylor
Investment Director



Stephanie White
Investment Director



Matthew Belcher
Research Analyst

w: www.bowmorewealth.com

20 Birchin Court, EC3V 9DU, United Kingdom



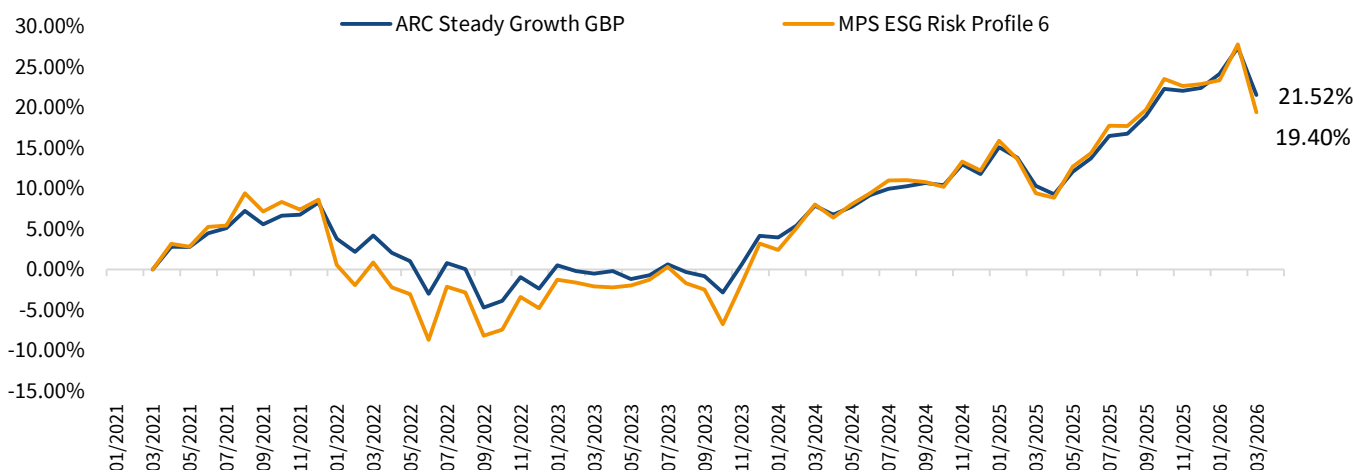
BOWMORE ASSET MANAGEMENT

MPS ESG Risk Profile 6

March 2026

MARKET UPDATE

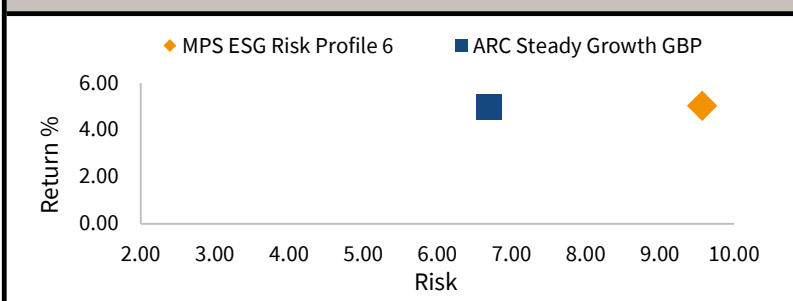
After a very strong start to the year for Equity markets in 2026, the US-Iran war in March saw these gains reversed. The main US stock market fell 8% in March, whilst the Japanese stock market fell by 15%. This was in response to a complete recalibration of the path of interest rates and inflation as oil prices spiked. Just as we forecast with the Liberation Day tariffs a year ago, we are anticipating a strong recovery in Q2 as, when the smoke clears, corporate earnings - the ultimate driver of share prices - should still be in tact.



5 YEAR ANNUALISED RISK VS RETURN

	Portfolio	ARC Comp 6
Annualised return	5.03	4.96
Annualised risk	9.57	6.69
Risk adjusted return	0.53	0.74
Annualised maximum draw down	-16.54	-11.97

5 YEAR ANNUALISED RISK VS RETURN



PORTFOLIO ATTRIBUTES

For a full break down of the expected costs and charges associated with a Bowmore portfolio, please contact our Investment Management team or your Financial Adviser.

DISCLAIMER

This document has been prepared by Bowmore Asset Management Limited, a private limited company authorised and regulated by the Financial Conduct Authority.

Asset allocation is rounded to the nearest one decimal place.

Nothing contained herein shall constitute any representation or warrant, and no responsibility or liability is accepted by Bowmore as to the accuracy or completeness of any information supplied herein.

Bowmore's portfolios are benchmarked against the ARC Private Client Indices.

Source: Third Financial

Performance figures are shown gross of Annual Management Charges (AMC), adviser and platform charges, but net of underlying fund charges. All income is assumed to be reinvested. Past performance is not a reliable indicator of future results. The value of investments can fall as well as rise, and any income from them is not guaranteed