



Crossing Point fact sheet

What is your corporate background?

Created as a collaboration between IFAs, academia and industry professionals, Crossing Point Investment Management was conceived in 2014 and formed in 2018 based on the conclusion of extensive academic research into an investment philosophy established upon trend-following and tactical trading. Our investment strategies are stringently based upon exhaustive and robust research and testing, backed up by MSc and PhD research papers.

Unlike many established and incumbent investment managers, we do not only rely upon static buy and hold strategies. We are fund selectors, asset allocators, market monitors and tactical traders.

Our advanced Guardian algorithms monitor and signal when to buy, hold or sell capital assets. These algorithms aim to allow us to participate in markets as prices rise, reduce exposure to markets when they decline, and provide consistent returns at lower risk and lower cost.

As well as our Guardian trend-following strategy, we have also added distinctive long-only offerings to our range. Our Green Path portfolios are designed for investment into sustainable and environmentally responsible funds. Our Heritage Portfolios are based on the superior return and diversity of investment trusts.

Our two most recent long-only strategy additions are Foundation and Heritage Dividend portfolios. Foundation portfolios seek to provide an accessible, efficient, reliable, and low-cost accumulation investment strategy similar to Guardian, but without trend-following. Heritage Dividend Portfolios have been created specifically to better provide stable natural income through the use of investment trusts.

Why should I consider using your model portfolios?

- Independent investment management
- We offer different strategies for differing client requirements and outcomes.
- Focus on growth and capital preservation
- Smooth long-term performance
- Broad diversification
- ESG specific Green Path portfolios
- Investment Trust Heritage and Heritage Dividend portfolios
- Unique tactically traded Guardian portfolios.
- Passive portfolios tend to be cheaper. In challenging times, such as today, when costs and regulation make a difference to positive or negative portfolio returns, we try to keep costs down.

What is your approach to fund management?

Risk controlled multi-asset portfolios

We offer a range of 19 risk-adjusted managed portfolios. They have been created for different types of investors with differing risk levels and investment strategies.

Guardian Portfolios

Our five Guardian portfolios do not rely upon static buy and hold strategies. We use our advanced algorithms to monitor and signal when to buy, hold or sell capital assets. Our systems are designed to allow us to protect investments from large stock market falls, mitigate sequence of returns risk, and reduce volatility while still participating in markets as prices rise. Guardian portfolios aim to provide consistent returns at lower risk and lower cost.

Each geographic equity sector is monitored individually. We may completely or partially exit one market and retain another depending on the positive or negative signals from that particular market sector. If we have sold out of a specific equity exposure, our monitoring system will signal when to reinstate that particular position as conditions become more favourable.

For our other portfolios we use buy and hold strategies.

We use independent fund management rating agencies to ensure fund selection process is rigorous and successful including Morningstar, Financial Express and Rayner Spencer Mills Research.

A number of risk measures, fund performance and fund cost and charges for our portfolios are reviewed monthly at Investment Committee level.

What investment solutions do you offer?

All 19 of Crossing Point model portfolios are available on Nucleus Platform.

- Guardian range - 5 momentum following portfolios.
- Foundation range - 5 passive portfolios.
- Green Path range - 3 Environmental, Social and Governance (ESG) passive portfolios.
- Heritage range - 4 Investment Trust portfolios.
- Heritage Dividend range- 2 Natural Income Investment Trust portfolios.

What are your fees?

- Model portfolios costs 0.25% Plus VAT

Who should I contact to discuss the service further?

For further information visit www.crossingpoint.co.uk

For support contact our Business Development Manager:

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