



## Marlborough fact sheet



### What is your corporate background?

Founded in 1985, United Financial Corporation (UFC) Ltd was formed to provide wealth management solutions to the mass affluent investment market. In 1998 to broaden the scope of services on offer UFC acquired the IMRO Regulated Unit Trust Manager Marlborough Fund Managers (MFM) Ltd and changed its own name to Marlborough Investment Management (MIM) Ltd.

In conjunction with MFM, MIM has gross funds under management of approximately £5.85 billion on behalf of more than 200,000 private, corporate and institutional clients, in a range of Bonds, ISAs, SSIPS, SSAS, Offshore Bonds and Authorised Unit Trusts.

In 2002, MIM acquired Apollo Investment Management Ltd in Guernsey which was rebranded as Marlborough International Management (Mint) Ltd in 2011.

The Marlborough Group of Companies today manages and administers approximately £10 Billion of funds.

### Why should I consider using your discretionary fund management service?

Marlborough Investment Management has a long established track record of value added portfolio management and as part of the wider Marlborough Group has access to considerable resources both in terms of physical systems and research capability, with the Group employing Multi-Award winning fund managers. MIM employs the latest analytical and information technology systems to assist us in our decision making process and is committed to an ongoing programme of training and competence that ensures our staff continue to be highly qualified and motivated.

### What is your approach to discretionary fund management?

MIM's philosophy is to produce portfolios which are specifically designed to meet a client's attitude to risk and capacity for loss in an environment in which the client is also easily able to quantify the value which is being added.

After performing a market wide search for suitable assets and performing thorough due diligence, we perform a detailed analysis at portfolio level to ensure each asset contributes without excessively increasing the risk profile. This approach reduces single asset risk and moves towards a focus on portfolio return. Our approach produces a range of portfolios which incrementally and logically increase in risk and return, with the intention being that the risk and return "co-ordinates" define a number of equidistant and progressively increasing outcomes.

### What investment solutions can you offer through the Nucleus platform?

Through the Nucleus Platform MIM will offer 10 individually managed portfolios across the widest range of risk possibilities.

### What are your fees?

0.25% + VAT (i.e. 30 bps)

### Who should I contact to discuss the service further?

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