

Introducing the Suggestus Manager Matrix

powered by ARC Research

What is the Suggestus Manager Matrix?

The matrix provides a comprehensive, clear and robust platform for your advisers to make smart decisions.

Home Matrix List View

Drag a column header and drop it here to group by that column

Manager	Latest Rpt	ARC View	Solutions Available	3D	PCI	ACI	DDQ	Reports
	06/21	●	Charity Model Portfolio	3D	✓	✓	📄	📄
	06/21	●	Fund Model Portfolio	3D	✓	-	📄	📄
	06/21	●	Charity Fund Model Portfolio	3D	✓	✓	📄	📄
	06/21	●	Charity Model Portfolio	3D	✓	✓	📄	📄
	06/21	●	Fund Model Portfolio	3D	✓	-	📄	📄
	06/21	●	Charity Fund Model Portfolio	3D	✓	✓	📄	📄
	06/21	●	Charity Model Portfolio	3D	✓	✓	📄	📄



Who is ARC?

ARC is a leading, data-driven investment consultancy serving financial advisers, trustees and other advisers to individual investors. We demystify the investment process using data and pioneering analysis to give you simple answers.

Find out more at [assetrisk.com](https://www.assetrisk.com)

ARC Facts

£1.5trn

Managed by PCI Contributors

£15bn

Assets Under Advice

Independent

We are not linked with any bank or investment manager

Why use ARC Research?

Our research arm provides the data and insight required to help you select the best investment manager to maximise the chance of meeting your long-term goals.

Our universe is made up of over 100 leading managers. Is yours one of them?

BREWIN DOLPHIN

BM
BROOKS MACDONALD

Cazenove
Capital

Investec

LGT
vestra

MORNINGSTAR

Psigma
Investment Management

QUILTER CHEVIOT
INVESTMENT MANAGEMENT

RUFFER

SARASIN
& PARTNERS

Smith &
Williamson

TILNEY
FOR PROFESSIONALS

Find out more at assetrisk.com/research/our-services/

A valuable difference

Our data shows that over a 10 year period, the difference between good performance and bad performance was over 20%.

That's a £100,000 difference for someone starting with £500,000.

PCI
PRIVATE CLIENT INDICES

300,000
Investment Portfolios

100
Investment Managers

18+ Years
Data history

The ARC Indices

The ARC Indices collect the actual performance of over 300,000 investment portfolios supplied by over 100 investment managers to establish the actual returns being seen by real clients.

ARC is unique in that it meets with the managers every quarter to thoroughly understand their results and drivers of return. This process gives us unrivalled insight into who is doing well, who is doing poorly and fundamentally why.

The headline figures are made available to everyone at no cost via our award winning suggestus.com website.

Find out more at suggestus.com

SUGGESTUS
POWERED BY ARC RESEARCH

ARC Scoring

Past performance shows you what has happened, but just as important is why and how it happened.

To assess each investment manager we use the ARC Indices data along with a range of other critical factors that are essential in delivering a high-quality investment service.

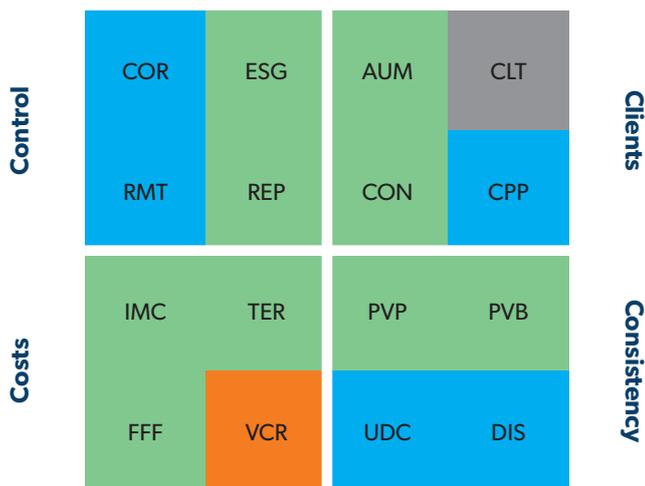
The scoring gives an objective assessment of four key areas, leveraging our team's 25+ years of experience.

Our assessment methodology is designed to maximise the chance of achieving your goals.

Style Assessment



Scoring Assessment



ARC Scoring Summary

Strategy:

ADFM PC Steady Growth PCI



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or visit suggestus.com