

Money Market MPS

FAQs

How do I access Money Market MPS?

The AJ Bell Money Market MPS is exclusively available through our Funds & Shares Service, so you won't find it on any other platforms.

What does it cost?

AJ Bell won't charge a management fee, which means the only costs for the portfolio are those of the underlying assets, which is confirmed on the portfolio factsheet.

What are the expected returns?

The AJ Bell Money Market MPS aims to provide cash-like returns by investing primarily in cash, money market funds and ultra-short-dated bonds and by avoiding more volatile assets. Using income units, not accumulation, means the income generated by the portfolio will appear on cash statements.



The value of investments can go down as well as up and your client may not get back their original investment.

Is there any minimum investment term?

Although we suggest a minimum holding period of three months, there is no firm requirement to hold cash within the Money Market MPS for a set period. The underlying assets all deal daily, so cash isn't locked in for any specific period and you can change approach whenever needed.



This document provides general information about the Managed Portfolio Service. It should not be read or construed as investment advice. It is your responsibility to assess your client's circumstances and make a personal recommendation that is suitable for their needs.

Will you rebalance this MPS alongside other AJ Bell model portfolios?

The portfolio is set to rebalance quarterly in January, April, July and October, but there is a ten percent tolerance before a rebalance would be required. In conjunction with the nature of the underlying assets this means that we expect rebalances to be infrequent, subject to cash flows and other account activity.

Where can I find more information?

You can find all the relevant details in the AJ Bell Money Market MPS factsheet.