AJBell Investcentre

TrinityBridge

Investment partner

Who we are

- For over 30 years we've managed portfolios for private clients, charities, trusts and family offices.
- We are active, multi-asset conservative investors with a long-term time horizon.
- We are client-focused, research-based and service-driven.

TrinityBridge – bespoke investment management service

The bespoke investment management service is intended for clients with £1 million + of AUM (although lower AUM can be accommodated) who require a discretionary portfolio service, potentially with a personal relationship with their investment manager, who has portfolio management responsibility.

The service is provided by over 85 bespoke investment managers, spread across nine teams and offices, supported by dedicated desk-based staff and TrinityBridge wider investment team resource.

Our philosophy and process

Our investment philosophy is guided by five principles:

Diversification

We are multi-asset class investors, as we believe diversification is the best way to lower risk and drive strong, risk-adjusted returns.

Global perspectives

Our portfolios favour market exposure to international markets and our research team reviews stocks on a global-sector basis.

Active management

We look to add value both through asset allocation and individual security selection.

Low-cost implementation

We favour direct investment, but will use selective collective investments where appropriate.

Institutional rigour

Our internal investment process is powered by deep fundamental research, collegial input and disciplined institutional-style rigour.

Benefits

- Bespoke investment management provides an individual investment management service to individuals, trusts, families, corporates and charities with an asset allocation and security selection based on meeting individual client objectives and priorities.

- Full tailoring of portfolios is available to meet client needs, preferences and objectives, ranging from income needs to company or sector exclusions based on ethical stances.

- Engagement with bespoke investment managers is available to all clients, ensuring that investment needs and objectives are taken into account when constructing the investment portfolio; initial and ongoing suitability is assessed by the regulated intermediary to ensure that the service is and remains suitable for the client.

We run portfolios that offer:

Diversification

We are multi-asset class investors, as we believe diversification is the best way to lower risk and drive strong, risk-adjusted returns.

Global perspectives

Our portfolios favour global market exposure and undertake research with a global perspective.

Active management

We look to add value both through asset allocation and individual security selection.

Environmental, social and governance

ESG considerations are embedded in our centralised equity and bond research to help identify both risks and opportunities.

Low-cost implementation

We favour direct investment, but will use funds or ETFs ("passives") where appropriate.

Institutional rigour

Our internal investment disciplines include deep fundamental research, collegial input and disciplined rigour reflecting our institutional pedigree.

Charges

For information on charges, please speak to your existing TrinityBridge contact or please do get in touch.

Contact details

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TrinityBridge is authorised and regulated by the Financial Conduct Authority.

The value of investments fluctuates over time and your clients could get back less than invested.

Information in this document is provided by the Investment Partner. AJ Bell Investcentre cannot be held responsible for any statements made.