

FOR PROFESSIONAL ADVISERS ONLY

# Introducing Global MPS: Broader horizons, broader choice

*Realising Ambitions.  
Securing Futures.  
We are Brooks Macdonald.*





**At Brooks Macdonald, our priority is to offer a comprehensive range of investment solutions to you and your clients, giving you the flexibility to select the approach that best meets your client's needs.**

The Brooks Macdonald Global MPS is the latest example of how we're expanding our scope of investment solutions to better support you and your clients.

Our Global MPS range consists of ten portfolios, five active and five passive, each aligned to a distinct risk profile, from Low Risk through to High Risk. The range is designed to provide advisers with a globally oriented solution, combining the benefits of passive global equity exposure with active asset allocation.

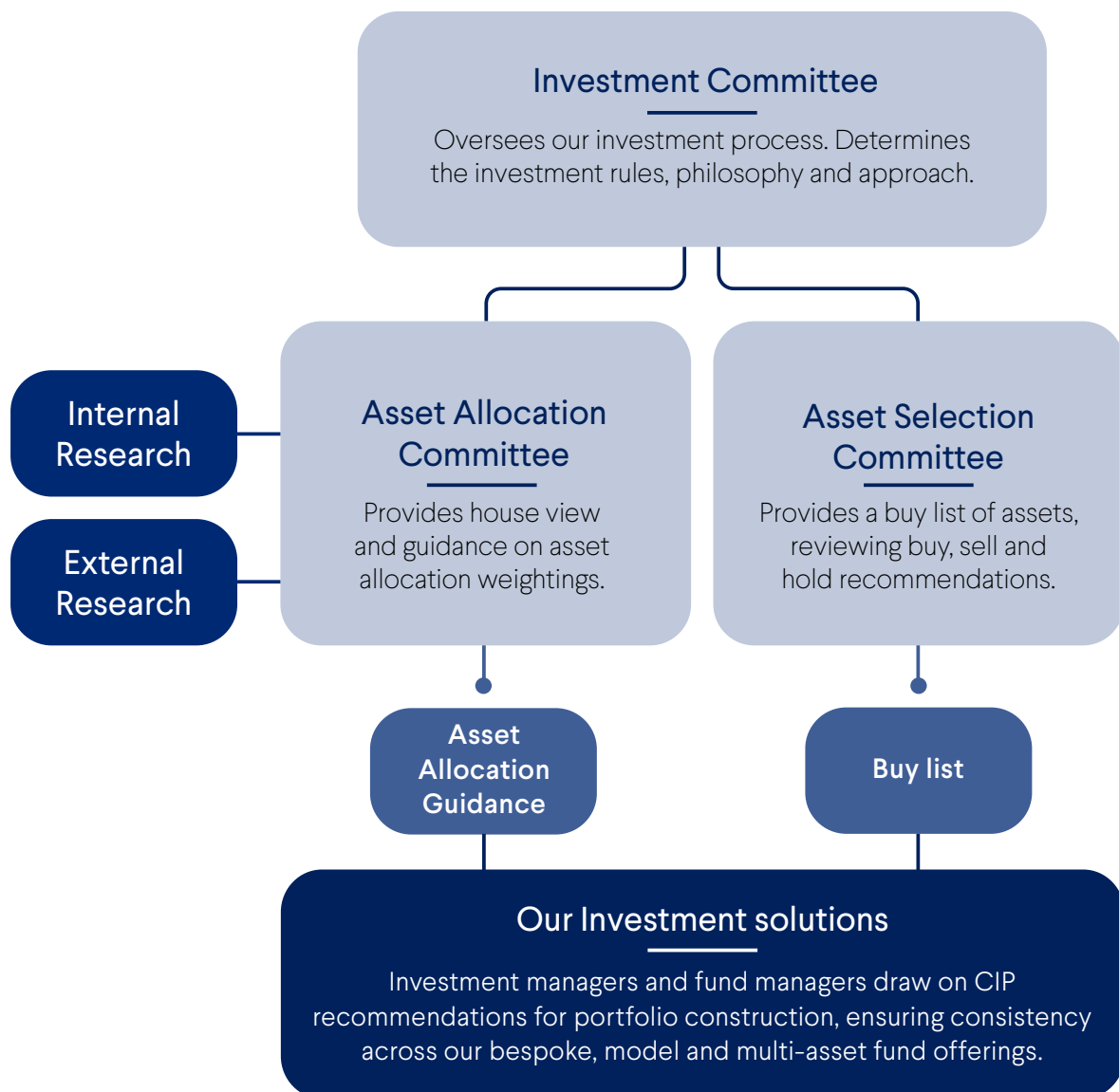
The range complements the existing Core MPS offering from Brooks Macdonald and maintains a clear link to Brooks Macdonald's house-view through our established Centralised Investment Proposition (CIP).



# Our investment approach

Our Centralised Investment Proposition (CIP) underpins all our investment propositions and strategies, including the MPS ranges. Our CIP involves research, risk assessment, and continuous monitoring to produce a repeatable and observable process with explainable results.

Here is an outline of its key processes:



# Why choose our Global MPS?

Our Global MPS solution provides several key benefits to your clients. These include:



**Globally oriented solution**  
with exposure across multiple asset classes, geographies and sectors.



**Guided by Brooks Macdonald's CIP**  
Providing structured asset allocation, rigorous research, and active oversight.



**Thorough process, rigorous oversight**  
Consistent, dependable outcomes can be demonstrated to both your clients and the regulator.



**Availability of portfolios across five risk profiles**  
Each is assessed independently by external risk profiling firms, providing you additional risk-mapping clarity.

## Who could benefit from Global MPS?

Global MPS is designed for investors seeking greater international diversification, providing an effective way to align portfolios with global market opportunities while retaining Brooks Macdonald's investment oversight. With both active and passive options across five risk profiles, it offers flexibility for those looking for a cost-efficient, globally diversified investment solution.

# How Global MPS works

Just like our Core range, the Global MPS range leverages the Brooks Macdonald Centralised Investment Proposition, providing a robust framework that delivers consistent client outcomes. However, the range takes a different approach to how equity exposure is managed. While our Core MPS range is structured solely around Brooks Macdonald's house asset allocation view, Global MPS dynamically adjusts its equity positioning to reflect the weightings of the MSCI All Companies World Index (ACWI).

While asset allocation guidance triggers changes to regional equity weightings across both our MPS ranges, adjustments to the Global range are made relative to their existing weighting within the MSCI ACWI rather than in absolute terms. In addition, the non-equity exposure in our Global MPS solution remains identical to those in our Core range.

Below, we have illustrated the absolute and relative allocations of the Global MPS Medium Risk and the Core MPS Medium Risk.

Sector	Global MPS Medium Risk	Core MPS Medium Risk	+/-
Equity - US	40.8	28.9	11.9
Equity - UK	3.9	20.6	-16.7
Equity - Europe	6.3	4.4	1.9
Equity - Japan	3.7	2.9	0.8
Equity - Asia/EM	9.3	7.2	2.1
Fixed Income - UK	18.0	18.0	0.0
Fixed Income - International	4.0	4.0	0.0
Alternatives	6.0	6.0	0.0
Structured Return	6.0	6.0	0.0
Cash	2.0	2.0	0.0
	100	100	

## Accessing the Global MPS range

The Global MPS range is available exclusively through wrap platforms. For more information, please contact your Brooks Macdonald Business Development Manager.



# Fees

Available exclusively to advisers via third-party wrap platforms, the price of Global MPS at launch is 15bps for active and 10bps for passive portfolios, reinforcing our commitment of providing great value to advisers and their clients.

	BM AMC	Fund OCF	Transactional	Incidental	MIFID II OCF	Model TER
Global MPS Low Risk	0.15%	0.28%	0.04%	0.00%	0.32%	0.47%
Global MPS Low to Medium Risk	0.15%	0.32%	0.04%	0.00%	0.36%	0.51%
Global MPS Medium Risk	0.15%	0.33%	0.05%	0.00%	0.38%	0.53%
Global MPS Medium to High Risk	0.15%	0.31%	0.05%	0.00%	0.36%	0.51%
Global MPS High Risk	0.15%	0.32%	0.06%	0.00%	0.37%	0.52%
Global MPS Low Risk (Passive)	0.10%	0.14%	0.01%	0.00%	0.15%	0.25%
Global MPS Low to Medium Risk (Passive)	0.10%	0.13%	0.01%	0.00%	0.14%	0.24%
Global MPS Medium Risk (Passive)	0.10%	0.11%	0.01%	0.00%	0.12%	0.22%
Global MPS Medium to High Risk (Passive)	0.10%	0.09%	0.00%	0.00%	0.09%	0.19%
Global MPS High Risk (Passive)	0.10%	0.09%	0.00%	0.00%	0.09%	0.19%

Model TER denotes model total expense ratio, AMC denotes annual management charge, OCF denotes ongoing charges figure.

## Important information

This document is intended for investment professionals only and should not be relied upon by any persons who do not have professional experience in matters relating to investments. The information in this document does not constitute advice or a recommendation and investment decisions should not be made on the basis of it. The value of investments, and the income from them, may go down as well as up and neither is guaranteed. Investors could get back less than they invested.

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