

# Adviser guide

abrdn MyFolio multi-asset fund ranges

June 2024

For professional investors only.

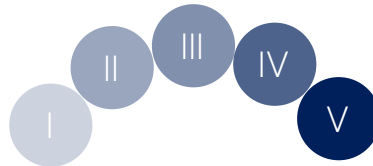
## Launched



# 2010

MyFolio launched in the UK supporting advisers with cost-effective, risk-targeted solutions

## Funds



MyFolio Funds are split across distinct ranges and risk levels

## Invested



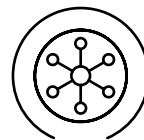
# £15 bn

Amount now invested in MyFolio (as at 31 March 2024)

## Why choose MyFolio?



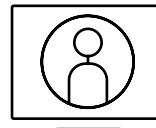
A cost-effective outsourced solution that allows you to focus on supporting your client's investment objectives



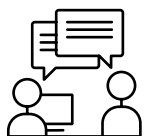
A range of options to explore your client's risk profile and preferred investment style including their sustainable investment goals



Delivering a long-term solution to clients for more than eleven years



Ongoing monitoring and rebalancing gives peace of mind that your client's risk and return objectives are being met



Comprehensive adviser support, including access to the MyFolio Lookthrough Tool to create customised client reports and find the latest fund information and updates

**MyFolio's range and breadth allows advisers to choose the fund most appropriate for their clients' needs.**

# Adviser guide

## What is MyFolio?

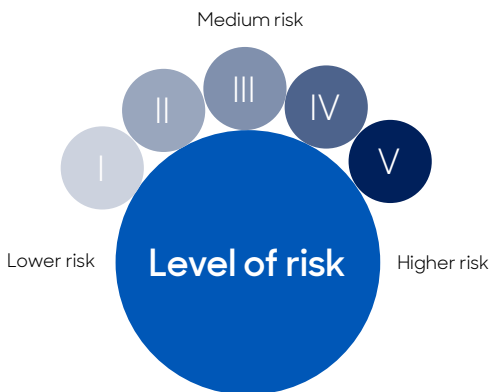
MyFolio consists of a range of multi-asset, fund of funds, split into distinct ranges and risk levels (from lower risk through to higher risk). This extensive choice gives you the flexibility to choose a solution that meets your client's preferred investment style and attitude to risk. Choose from:

<p><b>Index</b></p> <p>5 portfolios investing only in passive funds managed by abrhn (lowest-cost option)</p>	<p><b>Sustainable Index</b></p> <p>5 portfolios investing mainly in responsible passive funds managed by abrhn</p>	<p><b>Market</b></p> <p>5 portfolios investing mainly in passive funds</p>	<p><b>Sustainable</b></p> <p>5 portfolios investing mainly in funds with a specific sustainable or impact mandate</p>	<p><b>Managed</b></p> <p>5 portfolios investing mainly in funds run by abrhn</p>	<p><b>Multi-Manager</b></p> <p>5 portfolios investing in funds from a range of asset managers</p>
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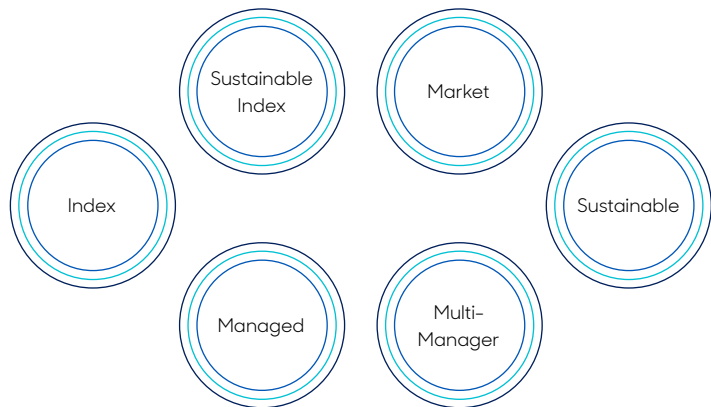
## Choosing the right MyFolio fund

Deciding which portfolio is right for your client is a very straightforward process.

Choose the appropriate risk level, from lower to higher risk.

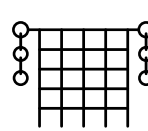


Choose a preferred investment style

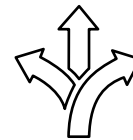


## What does MyFolio invest in?

Each MyFolio fund range invests in a mix of defensive and growth asset classes. Defensive assets include cash, government bonds, corporate and global index linked bonds. Meanwhile, growth assets encompass equities, high yield bonds, emerging market debt and property<sup>1</sup>. We believe that there are benefits from exploring additional diversifying assets in the MyFolio Managed, Multi-Manager and Monthly Income ranges.

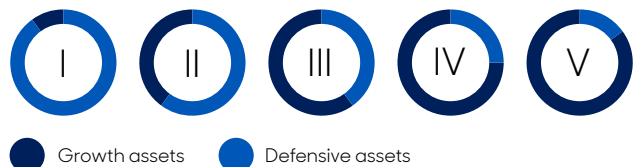


Defensive



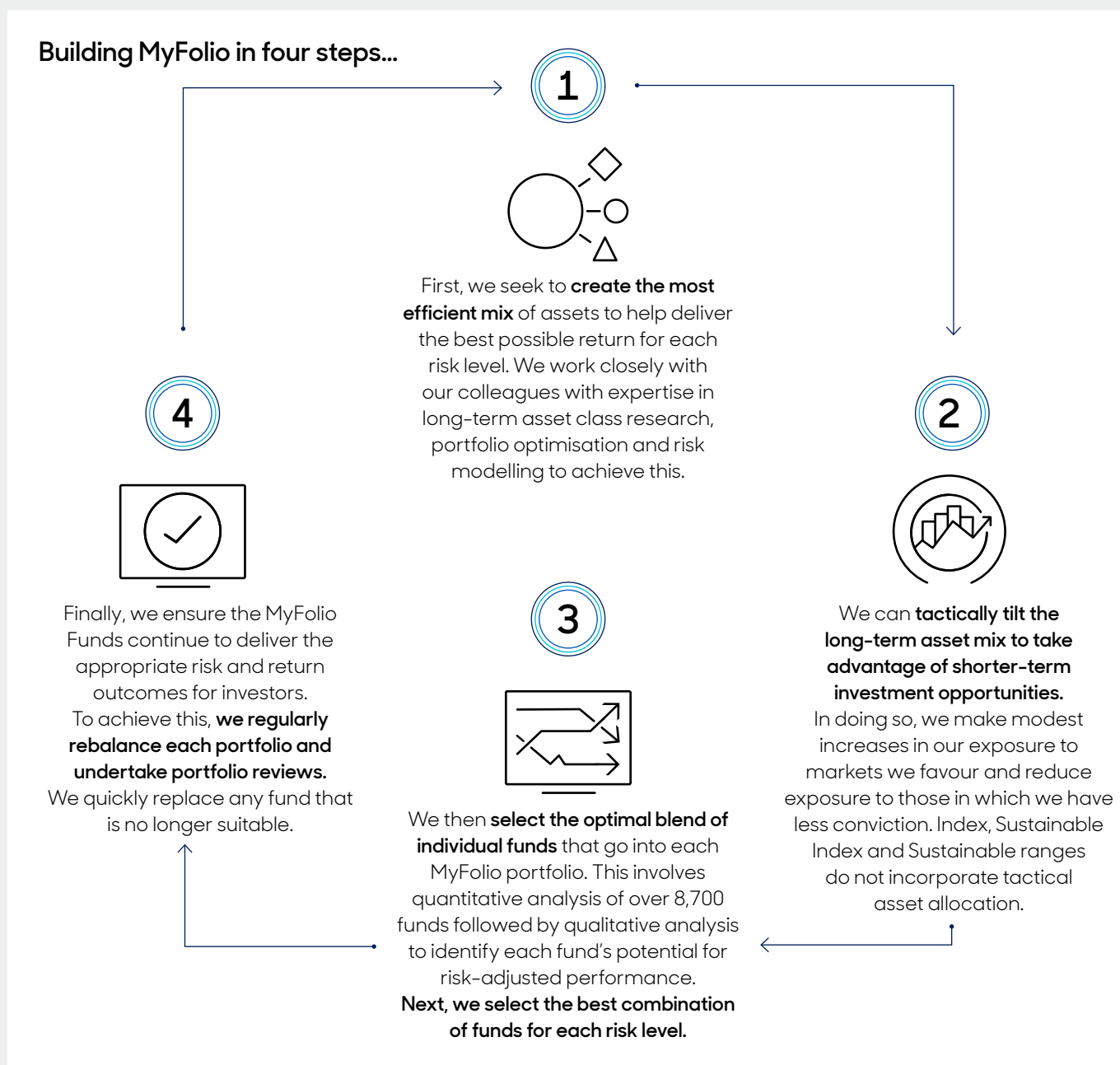
Growth

As you move up the risk levels, you would typically expect to see a higher proportion of the portfolio invested in growth assets and less in defensive assets.



<sup>1</sup> MyFolio Index invests in real estate through Global Real Estate Investment Trusts.

# Adviser guide



## Who manages MyFolio?

The responsibility for the MyFolio fund ranges lies across experienced portfolio managers, who are all part of the Multi-Manager Strategies Team.

Fund range	Portfolio manager(s)
Index, Sustainable Index and Market	Justin Jones and Daniel Reynolds
Managed and Multi-Manager	Katie Trowsdale and Robert Bowie
Sustainable	Katie Trowsdale and Mark Lane

# Adviser guide

## abr dn – Our global reach

A presence in over 30 locations keeps us close to our client-base.



### Asia

Bangkok  
Hong Kong  
Kuala Lumpur  
Seoul  
Shanghai  
Singapore  
Tokyo

### North America

Boston  
Miami  
New York  
Philadelphia  
**South America**  
São Paolo

### Europe

Aberdeen  
Amsterdam  
Birmingham  
Copenhagen  
Dublin

### Edinburgh

Frankfurt  
Geneva  
Jersey  
London  
Luxembourg

### Madrid

Milan  
Paris  
Stockholm  
Zurich

### Australia

Sydney  
Melbourne

### Middle East

Abu Dhabi

### Important Information

The value of your investments, and the income from them, may fall or rise and investors may get back less than they invested. Past performance is not a guide to future results.

Please refer to the Key Investor Information Document or the Prospectus for more details of the risks applicable to each fund in the abr dn MyFolio range, or ask your adviser. The abr dn MyFolio funds are not managed to a particular benchmark. abr dn has not considered the suitability of investment against your individual needs and risk tolerance.

For more information visit [abr dn.com](https://abr dn.com)

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