

# Elston Global Diversified Portfolios

## A range of 5 risk rated portfolios



### ABOUT THIS RANGE

- The Elston Global Diversified range consists of 5 multi-asset portfolios, defined by relative equity risk
- A dynamic asset allocation overlay enables a systematic risk management framework. The portfolios are constructed with transparent, liquid index funds and ETFs combining asset-based, factor-based and risk-based exposures for an integrated and diversified approach.
- The portfolio range is designed for investors requiring a dynamically-managed integrated investment strategy with clearly defined relative risk budgets.

#### Key points

- 1 5 risk profiles
- 2 Dynamically managed
- 3 Globally diversified

#### Additional information

Asset Class	Multi-Asset
Strategy	Relative Risk
Risk Profiles	5
Base Currency	GBP
Rebalancing	Systematic
Components	Funds/ETFs
Holdings	23
Launch Date	04-Jan-2021
Management Fee	0.30% (non-VAT)
Underlying OCF	0.12-0.27%

#### Overview

This portfolio range:

- Provides potential for diversified sources of risk-return integrating asset-based, factor-based and risk-based exposures.
- Delivers a systematic dynamically managed approach to adapt to changing market conditions
- Constructed with transparent, liquid index funds and ETFs for targeted exposures and cost efficiency.

#### Applications

This strategy could be used to provide:

- A **relative risk** multi-asset allocation strategy.
- A **core diversified, transparent and liquid** portfolio
- A comprehensive **integrated** approach.

#### Access

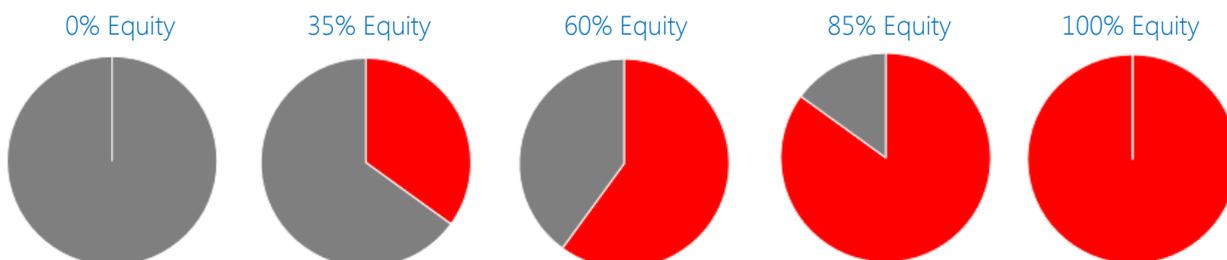
- Available on platforms by request
- Refer to stated objectives of each portfolio

[www.elstonportfoliomanagement.co.uk](http://www.elstonportfoliomanagement.co.uk)

The value of investments and any income from them may fall as well as rise and is not guaranteed.

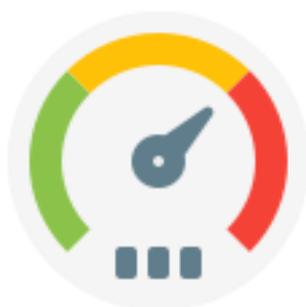
### 1. FIVE RISK PROFILES

There are five risk profiles to choose from, each defined by relative equity risk. Each portfolio is labelled by the maximum equity allocation for clarity and transparency.



### 2. DYNAMICALLY MANAGED

A dynamic asset allocation overlay enables a systematic active risk management framework to adapt to changing market conditions.



### 3. GLOBALLY DIVERSIFIED

The equity allocation is globally diversified, with no home bias. A factor-based overlay enables a more nuanced approach. The strategy has potential for diversified sources of risk-return by integrating asset-based, factor-based and risk-based exposures.

Preserve	Diversify	Grow
<ul style="list-style-type: none"> <li>• <b>Cash &amp; Equivalents</b></li> <li>• Cash</li> <li>• Ultrashort Bonds</li> <li>• <b>Bonds</b></li> <li>• Govt Bonds</li> <li>• Corp Bonds</li> <li>• Macro Factors</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Alternative Assets</b></li> <li>• Property</li> <li>• Infrastructure</li> <li>• Gold</li> <li>• Private Equity</li> <li>• Asset-backed securities</li> <li>• <b>Alternative Strategies</b></li> <li>• Diversified income strategies</li> <li>• Risk-based strategies</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Equities</b></li> <li>• Regional</li> <li>• Thematic</li> <li>• Sectoral</li> <li>• Capitalisation-weighted</li> <li>• Style-weighted</li> <li>• Factor-weighted</li> <li>• Risk-weighted</li> </ul>

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