



MANAGED PORTFOLIO INDICES

A STEP MEMBER SERVICE



www.mpindices.com

ABOUT MPI

MPI is a free-to-use STEP Member Service for trustees and private client advisers. We provide training, tools and reports that assist intermediaries to meet their responsibilities when appointing and monitoring discretionary investment managers.

INVESTMENT POLICY STATEMENTS

Take the worry out of writing your investment policy statements with our free-to-use online drafting tool.

Simple - A step by step approach to creating your Investment Policy Statement.

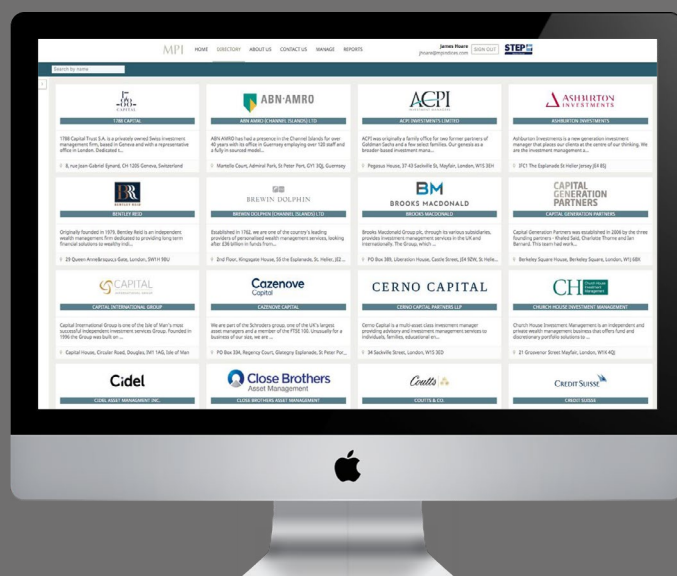
Comprehensive - Includes details about objectives, income requirements, investment restrictions and tax considerations.

Best Practice - Based on a sample Investment Policy Statement and accompanying guidance designed by STEP's UK Practice Committee.

DIRECTORY OF MANAGERS

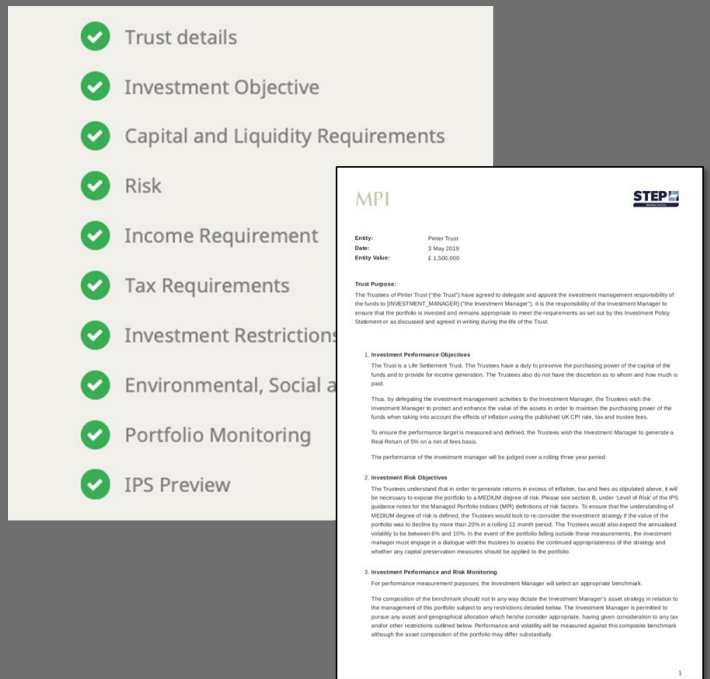
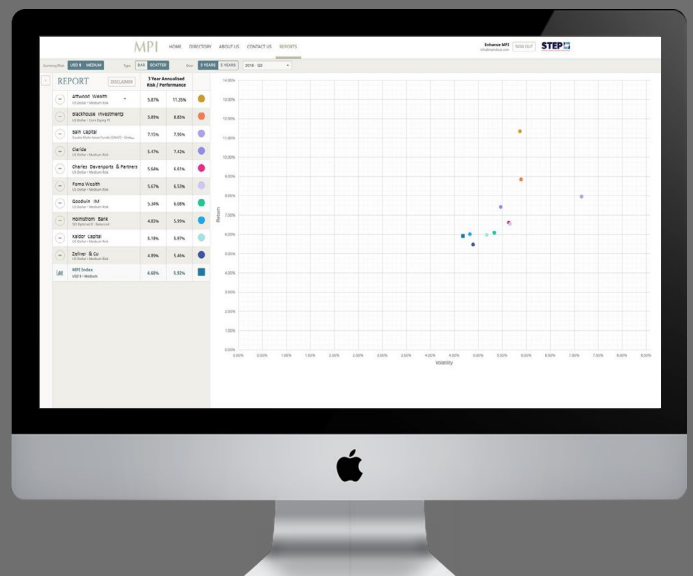
Browse our directory of over 50 leading investment management firms.

Search for managers based on their client, service and investment specialisations.



BESPOKE FOCUS LIST

Select your chosen managers and compare them based on investment performance and risk.



SIMPLE TO USE

Build your own bespoke panel of managers with MPI.



FIND

Search for managers that best match your client requirements.



SELECT

Select the managers that you want to include on your panel.



COMPARE

Compare the performance and risk of your chosen managers.

TRUSTED BY OVER 300 FIRMS

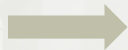
MPI is used by over 300 Trust and Advice firms to provide consistent and verified performance and risk from over 50 investment managers. All performance is provided net of fees so you can be sure you are comparing managers on an equal basis.

WHAT WE DO



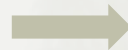
COLLATE

Collate performance and non-performance data from over 50 contributing managers each quarter.



VERIFY

Verify the data and check and remove outliers where necessary.



REPORT

Produce bespoke reports for trustees, advisors and investment managers.

CURRENCIES

Available in Sterling (UK), US Dollar and Euro





OUR CONTRIBUTING MANAGERS



				 BREWIN DOLPHIN	 BROOKS MACDONALD
					
					
					
 LLOYDS BANK	 LOMBARD ODIER LOMBARD ODIER DARTER HENTSCH				
					
					
 SPARROWS CAPITAL					
					

HOW TO APPLY & CONTACT


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