

WHY TAM ACTIVE?

Our Active service has grown and protected client capital for more than a decade. With a best of breed approach, the risk-graded model portfolios provide diversification not only by underlying investment asset and sector, but also by manager and corporate provider. Capital preservation is core to our strategy, and proactive investment action is implemented as soon as threats or opportunities arise.



SERVICE-LED AND TRANSPARENT

As a boutique investment manager, our streamlined process allows us to deliver more cost-effective and flexible solutions—without the multiple layers of management that often constrain larger institutions.

We solve problems for clients and have been recognised for ease of doing business and client communication.

We believe clients deserve direct access to our decision-makers and the TAM online platform offers full transparency into clients' portfolios and investment rationale.

A TRUE ACTIVE APPROACH

All too often, active management within the MPS market is relegated to a quarterly rebalancing exercise in which clients' portfolios are changed after the markets have moved, leaving clients in a perpetual state of reactive, not proactive, investing.

Capital preservation is as powerful as long-term investing, and this is why we do not wait for long drawn-out committees at the end of the quarter.

When we see threats or opportunities, we act immediately to protect or enhance our clients' position.





RISK MATTERS TO US

To an adviser, knowing that their client's chosen risk profile is set in stone is critical to ongoing suitability needs. Even in a major bull market, to TAM, a balanced portfolio will always remain balanced. We deviate only within controlled bounds.

We aim to deliver portfolios that outperform their benchmark over the market cycle, with lower volatility than our competitors during market drawdowns.

In a world full of uncertainty, TAM remains a safe pair of hands for all market environments, and each of our models has a clear and dependable set of rules which we won't stray from.

VALUE FOR MONEY

TAM exists at the intersection between the best levels of active management for the price of a passive investment service.

We invest into some of the most innovative funds and managers the wider market has never heard of. We source new and unique approaches to investing and combine them with more traditional fund instruments.

In doing this, we can often negotiate access into pioneering funds at steep discounts on AMCs, which many other DFMs cannot achieve.

Providing cost-effective investment solutions requires a long-term commitment.

