

WHY TAM ENHANCED PASSIVE?

Our Enhanced Passive service has been developed with our expert mutual fund and exchange traded fund research capabilities. The risk-graded model portfolios combine active management with “best-in-class” passive and enhanced passive investments, primarily favouring a rules-based, systematic approach. This provides increased diversification, with a strong emphasis on managing volatility and preserving capital.



BEYOND PLAIN PASSIVE

With markets likely to remain more uncertain and volatile than in recent years, Enhanced Passive offers a cost-efficient way to access a broad range of passive strategies with active oversight.

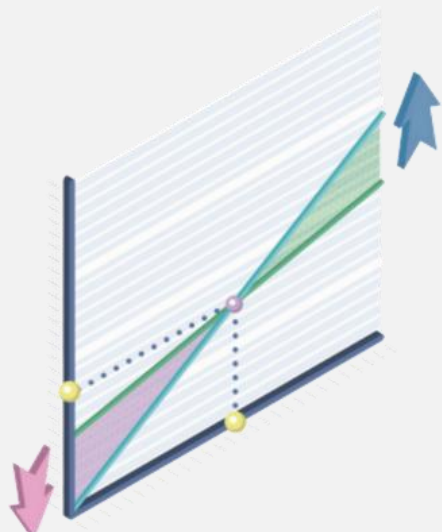
As a boutique independent manager, we have the agility to respond quickly to changing conditions—providing the protection, optimisation, and active input that larger providers often struggle to deliver due to their size and complexity.

MORE THAN EQUITIES AND BONDS

Our Enhanced Passive portfolios are guided by the research depth of our fully active investment service, giving us the freedom to pursue the best opportunities across the full alternatives universe—such as commodities, precious metals, infrastructure, and property. We also analyse the entire equity and bond ETF market to identify enhanced strategies that may deliver significant outperformance over standard index trackers.

In contrast, larger providers are often limited to their own in-house passive products, which can hinder their ability to select truly “best-in-class” investments—and ultimately limit their capacity to manage risk and volatility effectively.





VOLATILITY-AWARE

These portfolios have shown resilience during periods of high market volatility, thanks to their active management, broad diversification, and tactical use of enhanced passive funds.

In 2022, the active component played a key role in avoiding several market traps—resulting in a smoother return profile, which is critical for preserving client capital in down markets.

While traditional passive strategies may perform well during long, uninterrupted bull markets, they often struggle when portfolios need to adapt quickly to a shifting environment.

FLEXIBLE 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 and decision-making that often constrain larger institutions.

We're committed to engaging directly with investors, enabling deeper information sharing between you, your adviser, and the investment manager.

We believe transparency and close collaboration are key to building strong, long-term client relationships.



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