

## IronBright Philosophy

IronBright provides a proven, globally diversified discretionary management service. This is provided through sensibly priced, risk rated, objective driven portfolios.

IronBright's guiding principles are "belief in the future", "patience" and "discipline". 'Belief' that the whole market will continue to deliver long term value as it always has done; 'patience' to allow the market to deliver over the longer term and 'discipline' delivered through careful asset allocation, diversification and regular rebalancing of portfolios every six months.

IronBright offers simplicity, transparency, liquidity and low cost portfolios.

Our portfolios hold traditional assets classes such as equities, bonds, commercial property, fixed interest and cash. We avoid complex investment instruments such as hedge funds, complex derivatives and structured products.

For clients whose requirements prioritise income, these portfolios target higher than average yields.

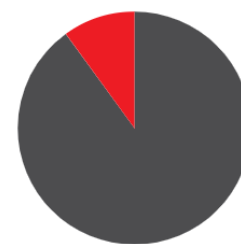
## Cumulative Performance



■ A - Asset Allocation Benchmark 100 05/09/1974 TR in GB (40.44%)  
■ B - IB EQINC - IronBright Equity Income Core-Satellite 01/11/2022 TR in GB (23.92%)

30/03/2018 - 31/03/2023 Data from FE fundinfo 2023

## Asset Allocation



Property	10%
Equities (UK & International)	90%

## Fund Managers



**Colin McInnes**  
Chief Investment Officer



**Steve Brady**  
Managing Director

[www.IronBright.com](http://www.IronBright.com)

## Portfolio Information

Launch	01 01 2012
DFM Charge	0.30%
Portfolio OCF	0.46%
Portfolio Yield	3.58%

## Platform Availability

IronBright, M&G Wealth, Novia, 7IM & Transact.

## Asset Class Allocation

UK Equities	50.0%
US Equities	17.0%
European Equities	9.0%
Far East (ex-Japan) Equities	6.0%
Global Equities	8.0%
Property	10.0%

## Discrete Performance

Name	2018	2019	2020	2021	2022
<b>IronBright Equity Income</b>	-9.07	18.52	-8.94	20.88	-3.66
<b>Asset Allocation Benchmark 100</b>	7.06	7.02	7.03	7.02	7.01

The above tables and charts illustrate the overall performance of the portfolio against its benchmark\*. Please note that past performance is not a reliable guide to future performance and the value of your investment can go down as well as up, so you could get back less than you invested.

The cumulative chart illustrates the overall performance over a maximum of five years dependant on the age of the portfolio and the table shows the overall performance broken down into specified periods. The discrete table illustrates how the portfolio has performed against the benchmark during whole calendar years. All performance is to the latest month end and in GBP.

IronBright has managed this portfolio based on the original investment mandate since May 2016. Prior to this date, the portfolio was managed by the founder directors of IronBright through Brunel Capital Partners Ltd and JM Finn & Co.

Benchmark used is based on projected returns of relevant asset classes as prescribed by the FCA in its most recently published paper dated September 2017.