

IronBright Philosophy

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

IronBright Sustainable portfolios are managed to two sets of principles: the IronBright investment principles and our sustainable principles.

IronBright investment 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.

Our sustainable principles encompass an Environmental, Sustainable and Governance (ESG) approach, offering an actively managed and diversified spread of investments that have a positive impact on society. These include equities, bonds, commercial property, fixed interest, and cash.

We avoid complex investment instruments such as hedge funds, complex derivatives, and structured products, thus delivering simplicity, transparency, liquidity within cost effective portfolios.

Cumulative Performance



Asset Allocation



Fixed Interest (Government & Corporates)	30%
Property (Global)	3%
Equities (UK & International)	67%

Fund Managers



Colin McInnes
Chief Investment Officer



Steve Brady
Managing Director

Portfolio Information

Launch	16 11 2020
DFM Charge	0.30%
Portfolio OCF	0.78%
Portfolio Yield	1.74%

Platform Availability

IronBright, Novia, M&G Wealth & Transact.

Asset Class Allocation

UK Equities	39.20%
European Equities	5.39%
Far East (ex-Japan) Equities	3.19%
Global Equities	17.88%
UK Corporate (Fixed Interest)	9.80%
Global (Fixed Interest)	19.60%
Global Property	2.94%
Cash	2.00%

Discrete Performance

Name	2018	2019	2020	2021	2022
IronBright 70 Sustainable	N/A	20.66	8.70	9.37	-17.67
Asset Allocation Benchmark 70	5.84	5.80	5.82	5.81	5.79

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.

This portfolio was launched on 16th November 2020, any performance figures shown prior to this date are historical projections based on the current allocation and are illustrative only.

*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.