

WealthSelect Passive Portfolios

WealthSelect is a discretionary, multi-asset, risk-targeted investment solution designed to help you deliver your clients' investment objectives while freeing up more of your time to concentrate on their broader financial planning needs.

With increasing regulatory demands across your business, WealthSelect allows you to outsource both the ongoing management of your clients' investments and the associated regulatory burden to our team of investment experts. We handle all aspects of fund research, monitoring, asset allocation, rebalancing, governance, and reporting.

WealthSelect is the UK's most comprehensive managed portfolio service, trusted to manage more than £19.5bn of investors' money (as at 31 March 2025).

There is a choice of 56 portfolios across eight different risk levels with each portfolio targeting a specific range of volatility.

The WealthSelect Managed Passive and WealthSelect Responsible Passive Portfolios have been designed to provide your clients with a lower-cost investment solution.



Risk targeted



Risk targeted

The portfolios are risk targeted, unlike other investment solutions that may only be risk rated. Risk targeting a specific volatility range helps the recommended portfolio remain suitable for your clients.

Forward looking

The asset allocation is not static – it is rebalanced quarterly and reviewed annually. This forward-looking approach aims to keep the portfolios within their specified risk targets.

Risk mapped

The portfolios are mapped to a wide range of external risk-profiling tools. This simplifies the integration of the portfolios into your existing advice process.

Supports your advice



Financial advisers only

Unlike other passive solutions, the portfolios are not marketed to customers and are only made available through your advice. This helps you to build meaningful, long-term client relationships.

Bespoke client reporting

We know how important it is to keep your clients informed, so we craft personalised client reporting each quarter, which you can co-brand with your logo and send to your clients.

Responsible investment options

The Responsible Passive Portfolios have been purpose built to meet the responsible investment preferences of a wider range of your clients.

Exceptional value



Track record

WealthSelect has an impressive 11-year history and the Passive Portfolios also have a compelling three-year performance track record evidencing the success of our investment process.

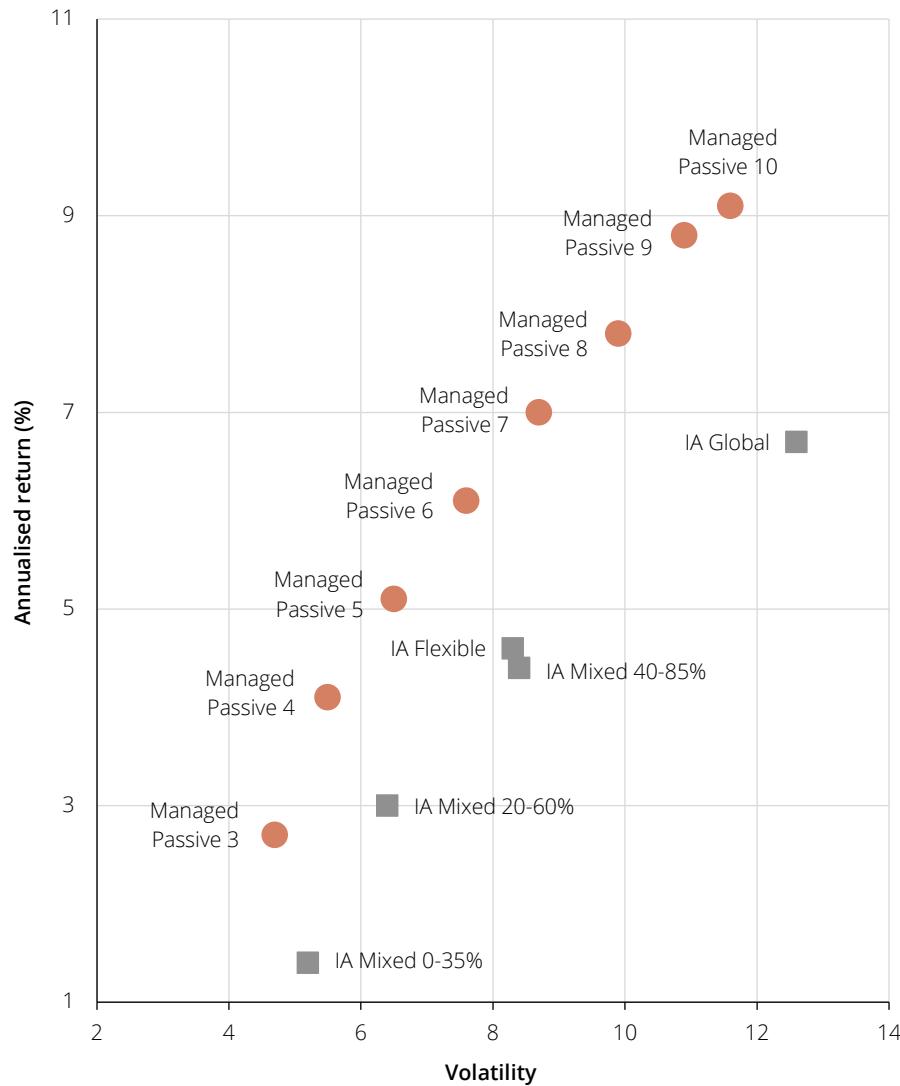
Cost effective

The average cost of the Managed Passive Portfolios is a highly competitive 0.22%, and for the Responsible Passive Portfolios it is 0.28%* - ideal for your clients who are cost-sensitive.

Supporting you

WealthSelect can help you streamline your processes and help manage costs, while still delivering excellent outcomes for your clients.

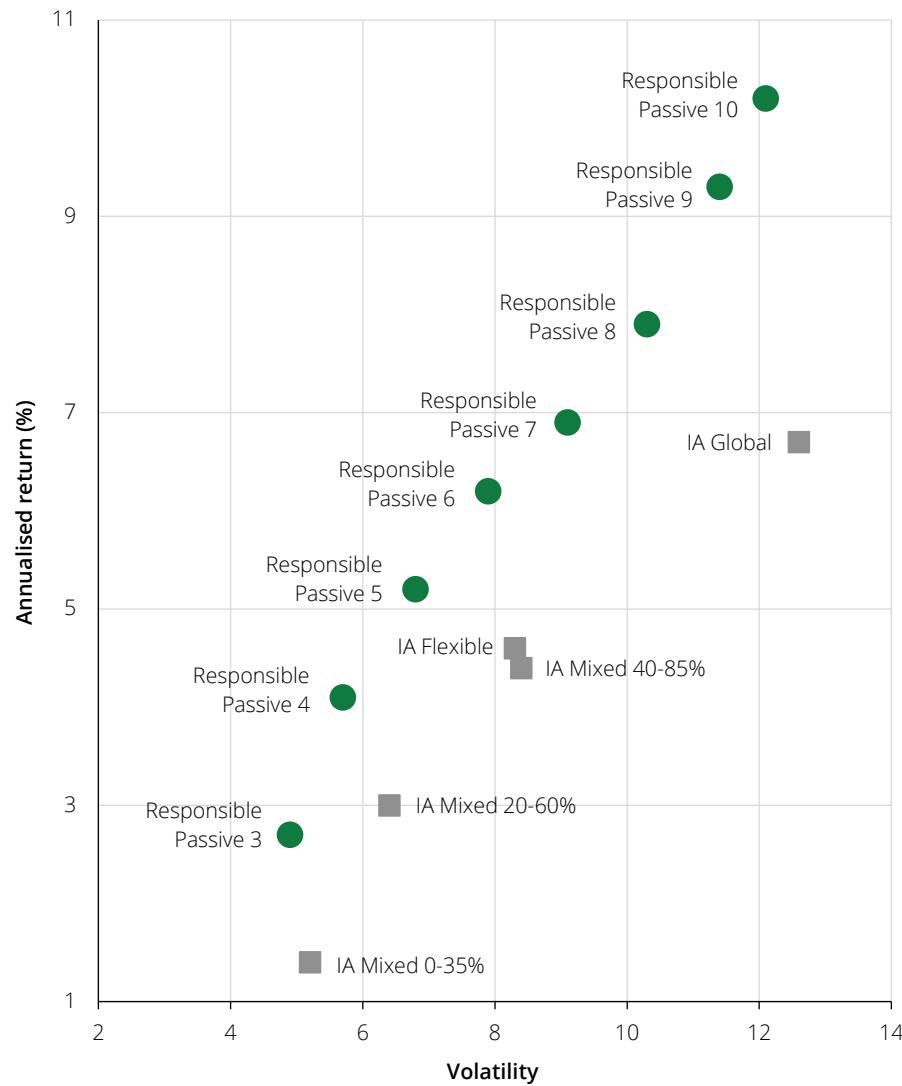
Risk and return since launch: WealthSelect Managed Passive Portfolios and IA sector performance comparators



	Cumulative performance (%)					Discrete annual performance to end of March (%)				
	YTD	1 year	3 year	5 year	Since launch	2024 - 2025	2023 - 2024	2022 - 2023	2021 - 2022	2020 - 2021
Managed Passive 3	0.6	4.3	7.2	-	8.6	4.3	6.9	-3.9	-	-
IA Mixed 0-35%	0.5	3.4	3.1	-	4.3	3.4	5.8	-5.8	-	-
Managed Passive 4	0.3	4.7	10.1	-	13.1	4.7	8.5	-3.0	-	-
IA Mixed 20-60%	0.2	3.8	6.3	-	9.7	3.8	7.8	-5.0	-	-
Managed Passive 5	0.0	4.9	12.2	-	16.6	4.9	9.9	-2.6	-	-
IA Mixed 20-60%	0.2	3.8	6.3	-	9.7	3.8	7.8	-5.0	-	-
Managed Passive 6	-0.2	5.1	14.2	-	20.0	5.1	11.2	-2.3	-	-
IA Mixed 40-85%	-1.2	3.3	8.5	-	14.2	3.3	10.1	-4.6	-	-
Managed Passive 7	-0.5	5.3	16.1	-	23.3	5.3	12.4	-1.9	-	-
IA Mixed 40-85%	-1.2	3.3	8.5	-	14.2	3.3	10.1	-4.6	-	-
Managed Passive 8	-0.8	5.4	17.4	-	25.8	5.4	13.6	-2.0	-	-
IA Flexible	-1.5	2.9	8.8	-	14.9	2.9	10.1	-4.0	-	-
Managed Passive 9	-1.3	5.3	19.9	-	29.8	5.3	15.2	-1.2	-	-
IA Flexible	-1.5	2.9	8.8	-	14.9	2.9	10.1	-4.0	-	-
Managed Passive 10	-1.9	4.7	20.5	-	30.7	4.7	16.4	-1.2	-	-
IA Global	-4.7	-0.3	13.1	-	22.1	-0.3	16.8	-2.8	-	-

Past performance is not a guide to future performance and may not be repeated. Source: Quilter and FactSet as at 31 March 2025. The table shows total return, percentage growth, and the chart shows annualised return, percentage growth and annualised volatility. All data rounded to one decimal place. The performance shown is after the deduction of the charges of the underlying funds, but before the deduction of the Managed Portfolio Service charge. The deduction of this charge will impact on the performance shown. The performance shown is based on a model of the WealthSelect Managed Passive Portfolios held via Quilter's platform. The performance of the WealthSelect Managed Passive Portfolios on other platforms may not be the same due to various factors including the availability of funds and share classes, the timing of trades, and the impact of costs and charges. The WealthSelect Managed Passive Portfolios launched on 8 March 2022.

Risk and return since launch: WealthSelect Responsible Passive Portfolios and IA sector performance comparators



	Cumulative performance (%)					Discrete annual performance to end of March (%)				
	YTD	1 year	3 year	5 year	Since launch	2024 - 2025	2023 - 2024	2022 - 2023	2021 - 2022	2020 - 2021
Responsible Passive 3	0.2	4.0	7.0	-	8.6	4.0	7.5	-4.3	-	-
IA Mixed 0-35%	0.5	3.4	3.1	-	4.3	3.4	5.8	-5.8	-	-
Responsible Passive 4	-0.3	4.2	10.0	-	13.3	4.2	9.6	-3.7	-	-
IA Mixed 20-60%	0.2	3.8	6.3	-	9.7	3.8	7.8	-5.0	-	-
Responsible Passive 5	-0.7	4.3	12.1	-	16.9	4.3	11.4	-3.5	-	-
IA Mixed 20-60%	0.2	3.8	6.3	-	9.7	3.8	7.8	-5.0	-	-
Responsible Passive 6	-1.2	4.4	14.1	-	20.4	4.4	13.0	-3.3	-	-
IA Mixed 40-85%	-1.2	3.3	8.5	-	14.2	3.3	10.1	-4.6	-	-
Responsible Passive 7	-1.6	4.4	15.3	-	22.9	4.4	14.6	-3.7	-	-
IA Mixed 40-85%	-1.2	3.3	8.5	-	14.2	3.3	10.1	-4.6	-	-
Responsible Passive 8	-2.1	4.4	17.1	-	26.3	4.4	16.2	-3.5	-	-
IA Flexible	-1.5	2.9	8.8	-	14.9	2.9	10.1	-4.0	-	-
Responsible Passive 9	-3.2	4.8	20.4	-	31.5	4.8	18.0	-2.6	-	-
IA Flexible	-1.5	2.9	8.8	-	14.9	2.9	10.1	-4.0	-	-
Responsible Passive 10	-4.3	4.0	23.3	-	34.7	4.0	21.7	-2.6	-	-
IA Global	-4.7	-0.3	13.1	-	22.1	-0.3	16.8	-2.8	-	-

Past performance is not a guide to future performance and may not be repeated. Source: Quilter and FactSet as at 31 March 2025. The table shows total return, percentage growth, and the chart shows annualised return, percentage growth and annualised volatility. All data rounded to one decimal place. The performance shown is after the deduction of the charges of the underlying funds, but before the deduction of the Managed Portfolio Service charge. The deduction of this charge will impact on the performance shown. The performance shown is based on a model of the WealthSelect Responsible Passive Portfolios held via Quilter's platform. The WealthSelect Responsible Passive Portfolios launched on 8 March 2022.

Past performance is not a guide to future performance and may not be repeated.
Investment involves risk. The value of investments may go down as well as up and investors may not get back the amount originally invested. Exchange rates may cause the value of overseas investments to rise or fall.

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