



Managed Portfolio Service Risk Mapping

January 2025

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Managed Portfolio Service (MPS) Risk Mapping

The following mapping is designed to help advisers who use the systems listed below to select the Managed Portfolio Service strategy that is most appropriate to their clients' risk profiles.

abr dn MPS	Dynamic Planner ¹	FinaMetrica ²	Defaqto ³	Oxford Risk ⁴	EValue ⁵	Synaptic ⁶
abr dn MPS 1	3	36-47	3	2	3	2.5
abr dn MPS 2	4	48-59	4	3	3	2.9
abr dn MPS 3	5	59-71	5	3	4	3.3
abr dn MPS 4	6	69-85	7	4	4	4.2
abr dn MPS 5	7	77-100	8	4	5	5

abr dn Sustainable MPS	Dynamic Planner ¹	FinaMetrica ²	Defaqto ³	Oxford Risk ⁴	EValue ⁵	Synaptic ⁶
Sustainable MPS 1	3	36-47	2	2	3	2.5
Sustainable MPS 2	4	48-59	4	2	3	3.0
Sustainable MPS 3	5	59-71	5	3	4	3.4
Sustainable MPS 4	6	69-85	7	4	4	4.1
Sustainable MPS 5	7	77-100	8	4	5	5.2

abr dn Index MPS	Dynamic Planner ¹	FinaMetrica ²	Defaqto ³	Oxford Risk ⁴	EValue ⁵	Synaptic ⁶
abr dn Index MPS 1	3	33-45	3	2	3	2.7
abr dn Index MPS 2	4	47-58	4	2	4	3.1
abr dn Index MPS 3	5	58-69	6	3	4	3.6
abr dn Index MPS 4	6	68-84	7	4	5	4.3
abr dn Index MPS 5	7	77-100	9	5	5	5.1

abr dn Sustainable Index MPS	Dynamic Planner ¹	FinaMetrica ²	Defaqto ³	Oxford Risk ⁴	EValue ⁵	Synaptic ⁶
Sustainable Index MPS 1	3	33-45	3	2	3	2.7
Sustainable Index MPS 2	4	47-58	4	2	4	3.1
Sustainable Index MPS 3	5	58-69	6	3	4	3.6
Sustainable Index MPS 4	6	68-84	7	4	5	4.3
Sustainable Index MPS 5	7	77-100	9	5	5	5.1

¹ Dynamic Planner Report for Q4 2024.

² FinaMetrica Report for 2024 published October 2024.

³ Defaqto Report published December 2024.

⁴ Oxford Risk scores based on the 1-5 risk band. Report for Q4 2024 published 10/01/25.

⁵ EValue scores based on Risk Band EV standard and a 5 year time horizon. Report for Q4 2024.

⁶ Synaptic Report for Q4 2024.



Q4 2024 ratings (based on most up to date information supplied by the various ratings agencies).

The mapping summarises the relationship between risk ratings and abr dn's Managed Portfolio Service strategies. It should be noted that most risk questionnaires assess an investor's attitude to risk only. As per FCA requirements, advisors are responsible for assessing all factors, including attitude to risk, financial circumstances, capacity for loss and investment time horizon when determining their clients suitability for abr dn's managed Portfolio Service strategies.

The mapping may be subject to future changes dependant on the investment performance or composition of the various MPS Strategies. The full abr dn MPS range of strategies is rated by Oxford Risk, DT Dynamic Planner, Defaqto, Synaptic, E Value and Finametrica.

Oxford
Risk

DYNAMIC
PLANNER

defaqto



FinaMetrica

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