

WEALTH MANAGEMENT

4 market beliefs

1

Markets work

Markets work effectively, pricing assets quickly and accurately: trying to beat the markets, as some investment managers promise, is a very challenging goal. We believe that capturing the market returns on offer is a more achievable and worthy goal.

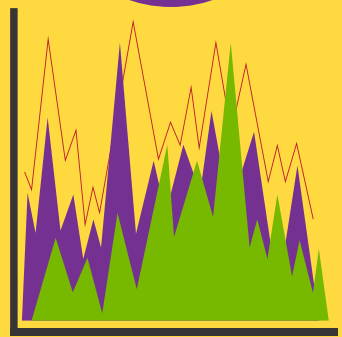


Risk & return go hand-in-hand

"If you want to earn high returns, be prepared to suffer grievous losses from time to time. And if you want perfect safety, resign yourself to low returns."

Walter Bernstein, author of 'The Intelligent Asset Allocator'

2

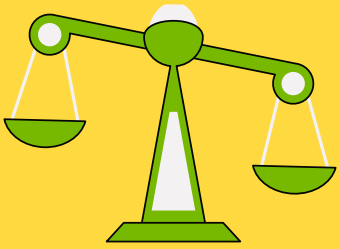


3

There are winners and losers

For every 'winner' beating the market, there has to be a 'loser' funding them: after costs there will be more losers than winners.

Costs really matter.



Diversification is an important tool

Diversifying across asset types, geographies, sectors and companies is the only real defence against an uncertain future. Diversification in portfolios ensures balance and a 'portfolio for all seasons'.

4



Bloomsbury Wealth has a sophisticated, yet elegantly simple approach to managing investments, founded on the deep investment theory and empirical evidence that is available to all investors, yet acted on by only a few.

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