Introducing the
Suggestus
Manager Matrix
powered by ARC Research

What is the Suggestus Manager Matrix?

The matrix provides a comprehensive, clear and robust platform for your advisers to make smart decisions.

Home	Matrix	List View

Drag a column header and drop it here to group by that column

Manager	Latest Rpt	ARC View	Solutions Available	3D	PCI	ACI	DDQ	Reports
	06/21	●	Charity | Model | Portfolio	3D	✔	✔	⬛	⬛
	06/21	●	Fund | Model | Portfolio	3D	✔	-	⬛	⬛
	06/21	●	Charity | Fund | Model | Portfolio	3D	✔	✔	⬛	⬛
	06/21	●	Charity | Model | Portfolio	3D	✔	✔	⬛	⬛
	06/21	●	Fund | Model | Portfolio	3D	✔	-	⬛	⬛
	06/21	●	Charity | Fund | Model | Portfolio	3D	✔	✔	⬛	⬛
	06/21	●	Charity | Model | Portfolio	3D	✔	✔	⬛	⬛

ARC

ARC GROUP   EST. 1995

London | Guernsey | Jersey | Toronto

Who is ARC?

ARC is a leading, data-driven investment consultancy serving financial advisers, trustees and other advisers to individual investors. We demystify the investment process using data and pioneering analysis to give you simple answers.

Find out more at **assetrisk.com**

ARC Facts

£1.5trn
Managed by PCI Contributors

£15bn
Assets Under Advice

Independent
We are not linked with any bank or investment manager
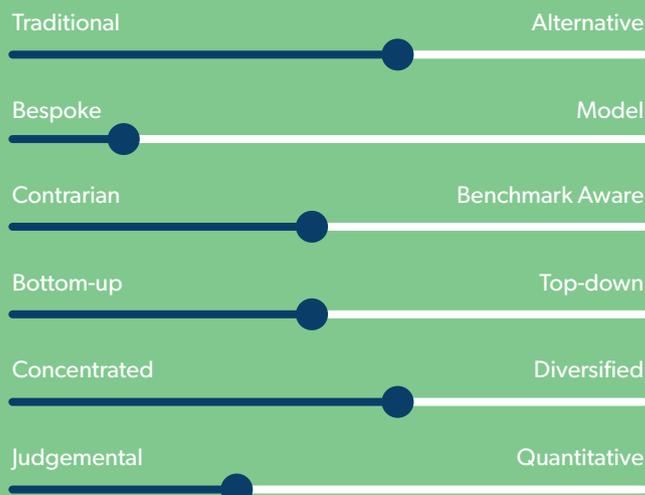
SUGGESTUS
POWERED BY ARC RESEARCH

ARC Scoring

Past performance shows you what has happened, but just as important is why and how it happened.

To assess each investment manager we use the ARC Indices data along with a range of other critical factors that are essential in delivering a high-quality investment service.
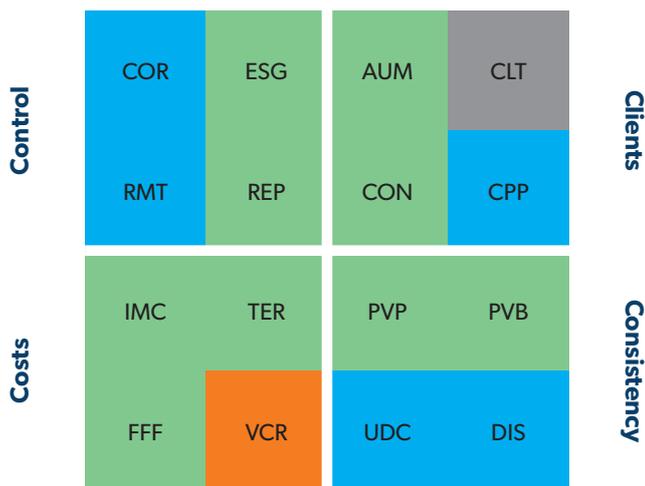
The scoring gives an objective assessment of four key areas, leveraging our team's 25+ years of experience.

Our assessment methodology is designed to maximise the chance of achieving your goals.

Style Assessment

Traditional	———————●—————	Alternative
Bespoke	—●———————————	Model
Contrarian	————●—————————	Benchmark Aware
Bottom-up	————●—————————	Top-down
Concentrated	——————●———————	Diversified
Judgemental	——●——————————	Quantitative

Scoring Assessment

Control

| COR | ESG | AUM | CLT |
| RMT | REP | CON | CPP |

Clients

Costs

| IMC | TER | PVP | PVB |
| FFF | VCR | UDC | DIS |

Consistency

- 🟩 No concerns identified
- 🟧 Potential area of significant concern
- 🟦 Potential area of concern
- ⬜ No score available

ARC Scoring Summary

Strategy:

ADFM PC Steady Growth PCI

Control	Clients	Costs	Consistency
🟩	🟩	🟧	🟩

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or visit **suggestus.com**