

Risk-Based Investment Portfolio



What is it?

A Risk-Based Portfolio from MVAM is built to match your risk-return profile, whether cautious, low, moderate, high or adventurous. They can be diversified across multiple asset classes to manage risk effectively.

Investments are structured to balance growth potential with capital preservation based on your risk level and financial objectives. Portfolios are effectively monitored and adjusted to respond to changing market conditions.

A Risk-Based Portfolio can be designed to provide stability during downturns or try to capture growth opportunities, depending on what you are looking for.

Rewarding risk

Each portfolio is built around your personal risk profile. Our managers have extensive experience running multi-billion diversified portfolios.

An asset allocation model informs our decisions and has stood the test of time.

Risk-Based Investment Portfolios at MVAM can be stand-alone accounts or part of a SIPP, SSAS, or ISA portfolio.

Retain access

If you need your money back, no problem. We simply sell the shares and send you the money.

WARNING: The value of your investment may go down as well as up and you may not get back what you invested.

Fair fees No entry or exit fees / Annual management charge 1.25% inc. VAT / Dealing fees will be charged



A dedicated investor portal app



Personalised reports issued monthly



We always remember, 'it's your money'

About MVAM Financial Advice

MVAM Financial Advice offers innovative and bespoke investment services to private clients and intermediaries. We have a highly experienced team investing clients' savings directly into the markets aided by proprietary screening and original research.

Get in touch

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Our portfolio family

- AIM Inheritance Tax Portfolio (AIM)
- Risk-Based Portfolio
- Fixed Income Portfolio (FIP)
- Make The World Better Portfolio (MTWB)
- Premium Dividend Portfolio (PDP)
- Precious Metals Portfolio (PRM)
- Short-Term Bond Portfolio (STB)
- Special Opportunities Portfolio (SOPs)
- Yorkshire T20 Portfolio (YT20)

Saving through...

- Pensions
- Corporate Pension Schemes
- General Investment Accounts
- ISAs / JISAs / LISAs

MVAM Financial Advice is a trading name of Mole Valley Asset Management Ltd (MVAM), registered in England (08600041) and is authorised and regulated by the Financial Conduct Authority, FRN 613008.

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