



MVAM

MOLE VALLEY  
ASSET MANAGEMENT

# YORKSHIRE T20 PORTFOLIO



# WHO?

Mole Valley Asset Management offers innovative and bespoke investment services to private clients and intermediaries.

# WHAT?

The Yorkshire T20 Portfolio WILL ONLY invest in listed companies which are based in Yorkshire, in line with our firm commitment to local community-based asset management.

There are over 80 companies, with head offices in Yorkshire, that trade on the stock markets. These range from gourmet food producers to digital gaming companies, from property giants to healthcare equipment minnows.

The locally based team at Mole Valley Asset Management has the knowledge and experience to understand these companies, identify the changing trends and to select the Top 20 Yorkshire listed companies for your very own portfolio.

Our Yorkshire T20 Portfolio will only invest in 20 Yorkshire based listed companies. The Portfolio will be closed to new investors once the total amount invested has reached £25m.

## WHY?

### Support the local community

Yorkshire has diverse and dynamic companies that are frequently world leaders in their own specific areas.

Be part of your community. Invest with your local investment team in your local companies.

### Go for an ISA

Attractive tax structure: tax-free ISA status.

### Rewarding Risk

A concentrated portfolio, investing in strong, focused companies, with a successful track record, valued at between £10m and £10bn, selected by our in-house, York based investment team.

## RETAIN ACCESS

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

## KEY BENEFITS

- Invest in good quality companies
- Consistent, repeatable strategy
- Clear reporting
- Money back usually within a week of receiving a redemption request

## FAIR FEES

- No charge for advice
- No entry fees or exit fees
- Annual management charge of 1.25% including VAT
- Dealing and admin fees will be charged

## OUR PORTFOLIO FAMILY

- AIM Inheritance Tax Portfolio (IHT)
- Bespoke Investment Portfolios (BIPs)
- Fixed Income Portfolio (FIP)
- Make the World Better Portfolio (MTWB)
- Premium Dividend Portfolio (PDP)
- Rain or Shine Portfolio (PSP)
- Yorkshire T20 Portfolio (YT20)

## SAVING THROUGH

- Pensions
- Corporate Pension Schemes
- General Investments Accounts (GIA)
- ISAs

## WARNING

The value of your investment in this portfolio and the income from it may go down as well as up, and you may not get back what you invested.

# ABOUT US

Mole Valley Asset Management offers innovative and bespoke investment services to private clients and intermediaries.

A highly experienced team investing clients' savings directly into the markets aided by proprietary screening and original research.

A dedicated investor portal app.

Personalised reports issued monthly.

We always remember, 'It's your money'.

# GET IN TOUCH TODAY

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## MOLE VALLEY ASSET MANAGEMENT

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Mole Valley Asset Management Ltd (MVAM), registered in England (Company no. 08600041) is authorised and regulated by the Financial Conduct Authority (registration no. 613008).