

Investment Research

MPS Directory

Research discretionary managed portfolios with ease

Increased regulatory and administration requirements have led financial advisers towards outsourcing many processes, including portfolio management. With the Consumer Duty regulations, it is now even more vital that due diligence is not only thorough, but also clearly evidenced on proposed investment solutions.

For nearly 10 years we've provided transparency to the market with our MPS Directory, available via FE Analytics. We understand that it can be challenging to research MPS providers, so our solution was built to help advisers conduct more structured research on their third-party investment propositions. It allows you to analyse and review model portfolio data, literature and factsheets.

The level of openness and transparency championed by the MPS Directory continues to assist model providers and advisers in connecting and communicating better, and ultimately providing better client outcomes.

One of the common complaints when researching model portfolios is whether you are comparing like with like, due to the variety of terminology and benchmarks used by providers. Our FE fundinfo Risk Score presents an easy-to-understand measure of volatility relative to the UK large cap index of the 100 largest companies – demonstrating the consistency of a portfolio's risk profile in both the immediate and long-term, when compared to the market.

Why FE fundinfo

We connect the fund management industry to inform better investment decisions. Our data, technology, research, network and insights empower fund managers, distributors and financial advisers.

For more information contact:
e enquiries@fefundinfo.com
w fefundinfo.com





THE BENEFITS



Market-leading DFMs

Research portfolios from over 85 of the UK's most used MPS providers, including FE Investments. Conduct extensive research and due diligence across a range of portfolios, at a holdings level, all in one place.



Golden source data

We receive data directly from the providers to ensure that you always have access to full, accurate, and up-to-date performance history, information and documentation for each model portfolio listed.



Ensure suitability

Utilise FE Analytics' wide variety of tools to compare your clients' model portfolios with benchmarks of your choosing.



Demonstrate value of advice

Analyse 'what if' scenarios at all portfolio switching points and demonstrate the impact of your advice.



Request additions

Can't find the provider you're looking for? Request for new DFMs and model portfolios to be added. If you run our own in-house models, they can also be added so you can monitor your proposition.



Review changes

Portfolios are updated in real time, providing you with a transparent look-through of each model rebalance.