FE fundinfo

HOW TO

Navigate the new UK MPS Universe in FE Analytics

Content

Introduction

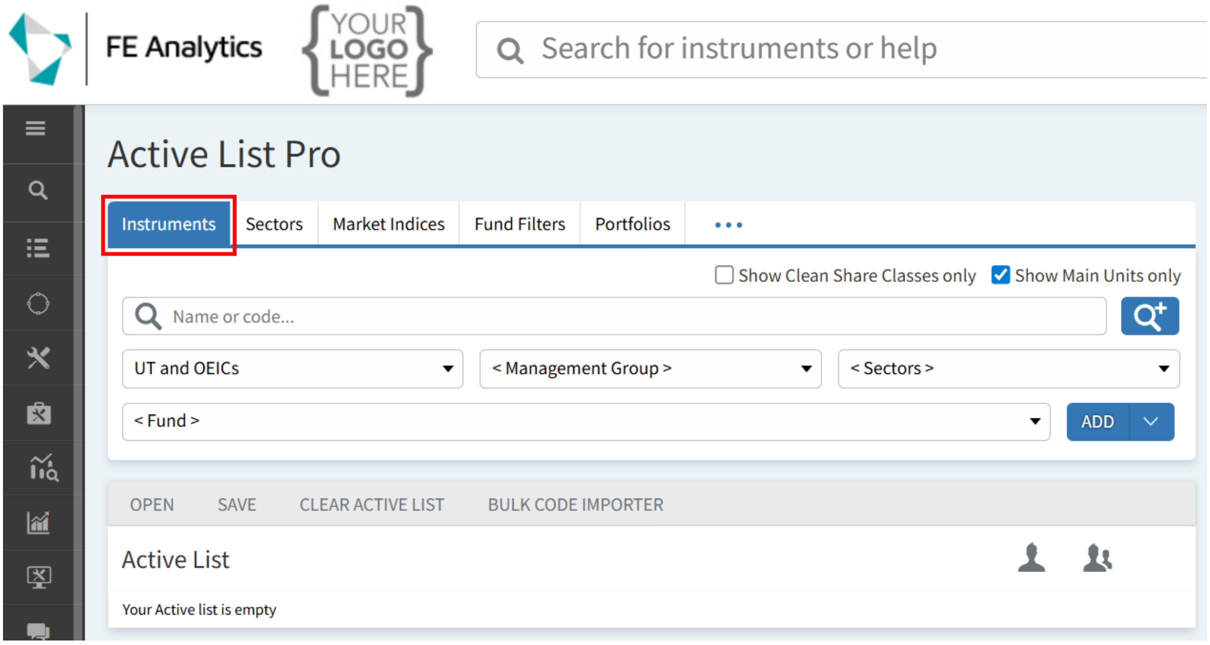
This guide outlines the steps to access and use the new MPS Universe within **FE Analytics**.

The UK MPS Universe in FE Analytics revolutionises adviser workflow by consolidating all MPS research, comparison and documentation into FE Analytics' familiar interface.

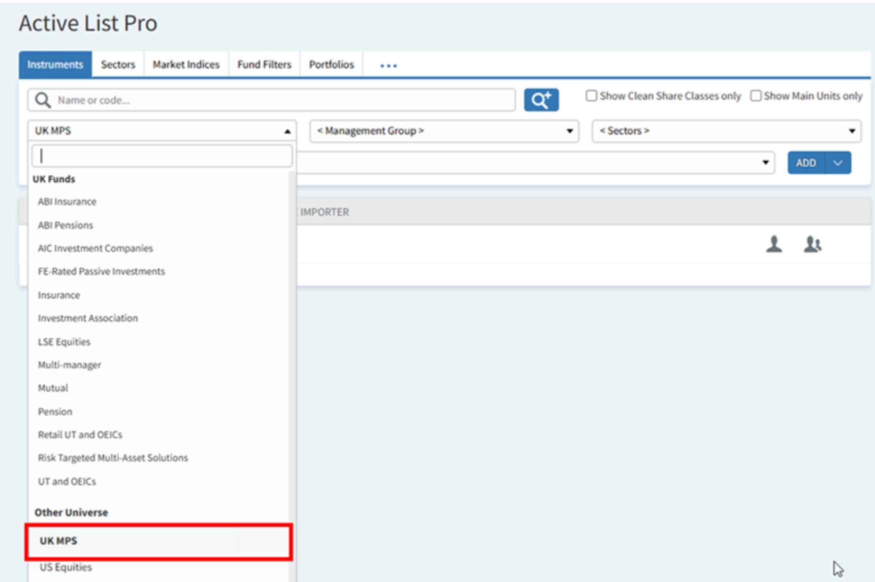
This unified solution enables robust due diligence with daily validated data, advanced filtering capabilities and integrated reporting, therefore eliminating the need to navigate multiple platforms during the advice process and allows DFM's to differentiate in a competitive market.

1. Locate the UK MPS Universe the Instruments tab

Once you have logged in to your FE Analytics account, select the '**Instruments**' tab in the home screen:

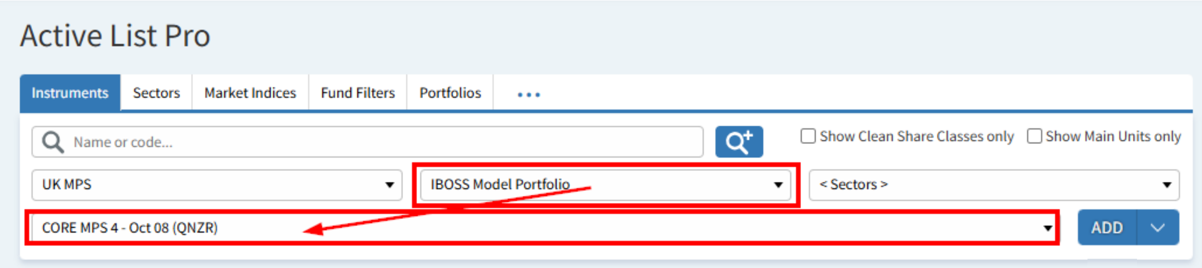


Using the left-hand drop-down menu, please scroll down until you see the '**Other Universes**' section, where you will see '**UK MPS**' as an option.



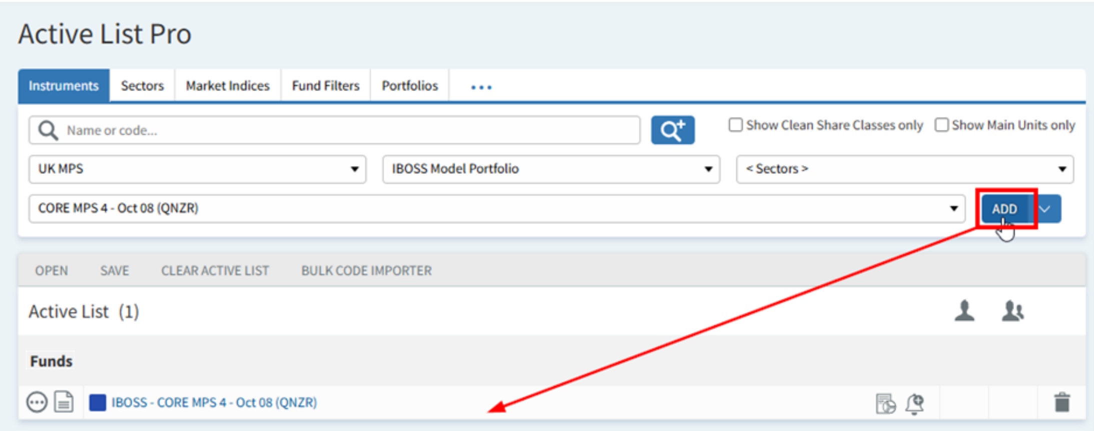
Please note: If you do not see the above option in the drop-down menu, please contact customersupport@fefundinfo.com

Once you have selected this Universe, you will then be able to select the '**Management Group**' and the individual Model Portfolio from the dropdown underneath:

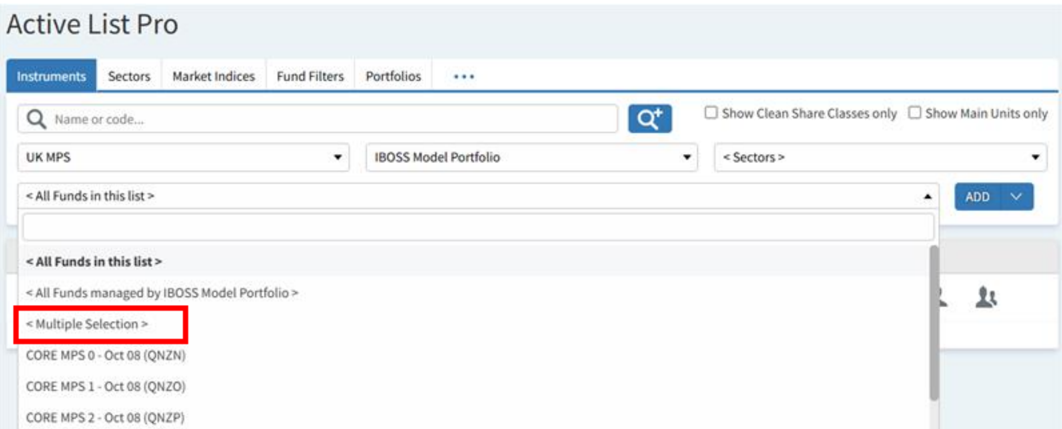


2. Add the Model Portfolio to the Active List

To access the information available for the Model Portfolios, once you have selected your Model Portfolio(s) using the steps above, you will need to add it to the '**Active List**'. Simply click the '**Add**' button shown below:



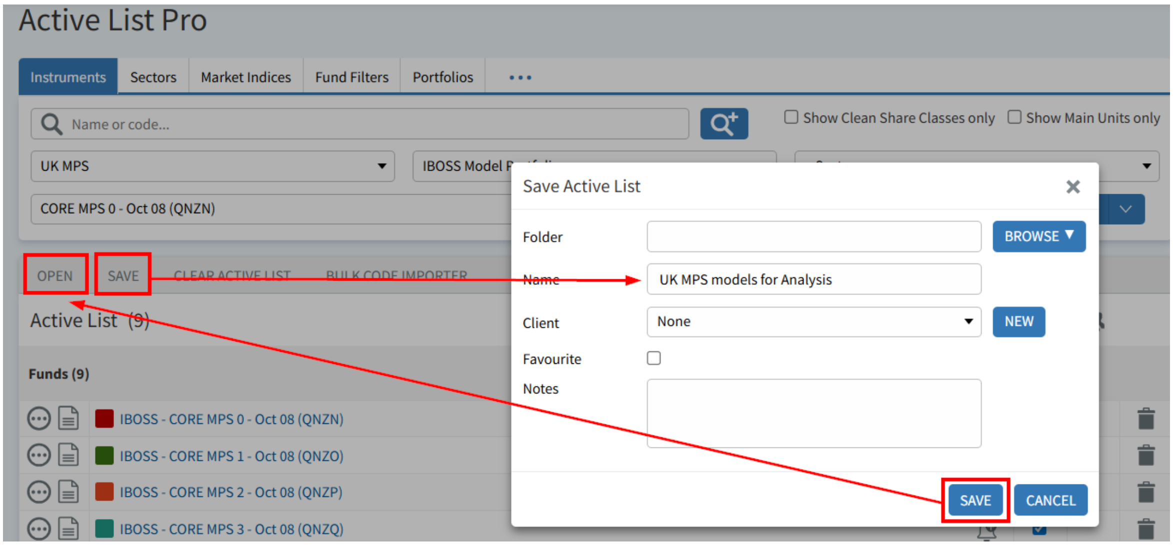
You can select multiple Model Portfolios from this dropdown by using the '**Multiple Selection**' option. This allows you to select as many as you need using the '**CTRL**' button on your keyboard and selecting each with the mouse:



To add them to the '**Active List**', click the '**Enter**' button on your keyboard once you have made your selections.

TIP: You can save your '**Active List**' so that the next time you need those Model Portfolios, you can open them up very quickly.

Simply click the '**Save**' button shown below and enter a name for the Active List (as well as other options as applicable):

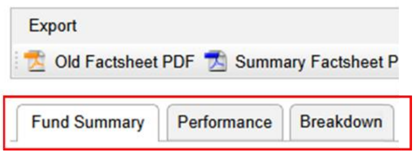


Once saved, the next time you need the Model Portfolios, you can use the '**Open**' button (also shown in the above) to select that Active List from the directory and you're ready to conduct your research.

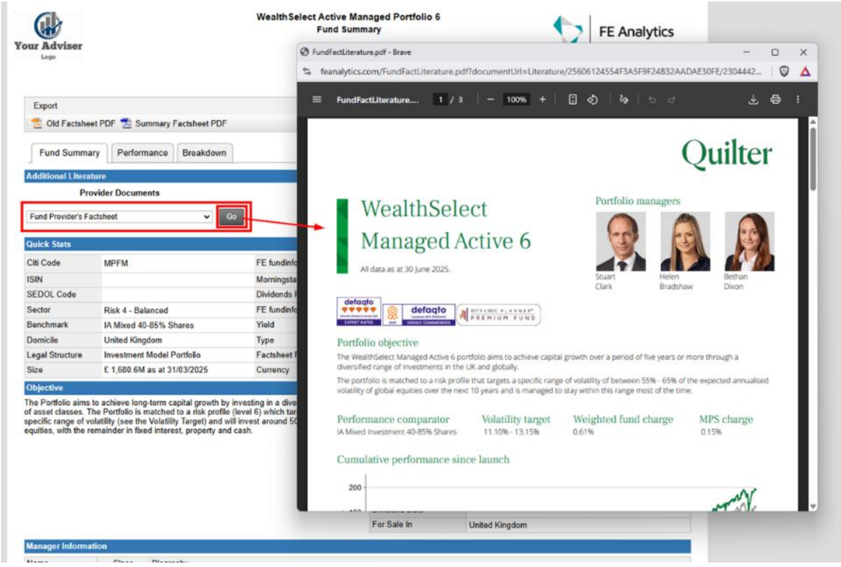
3. MPS Factsheet & Documents

Once you have added your Model Portfolio(s) to the Active List following the steps above, you will see two icons to the left of the Model Portfolio on the Active List:

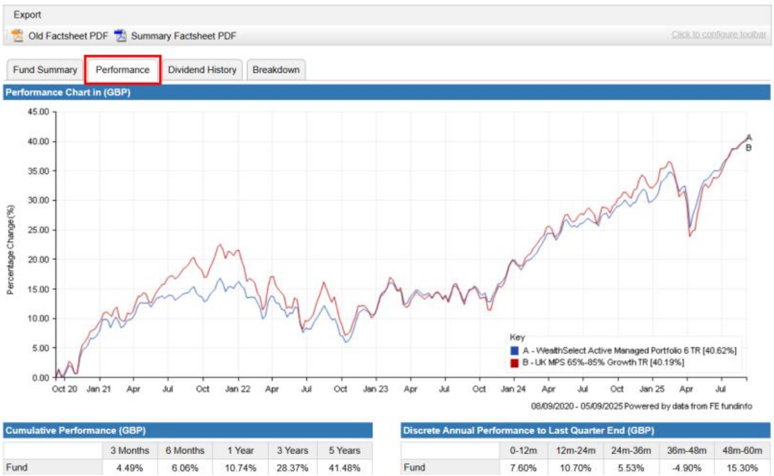
The paper icon will open the Factsheet, which enables you see detailed information about the Model Portfolio by using the tabs at the top:



1. **Fund Summary Tab**
   Gives you a summary of information including our FE fundinfo Crown Rating (which allows you to identify the best performing and most consistent funds over the long term), as well as direct access to key documentation via the '**Fund Documents**' dropdown.

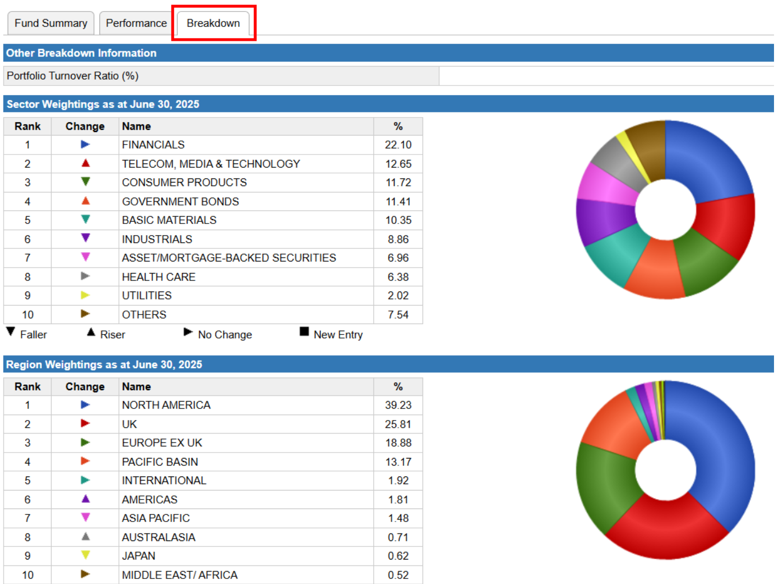


2. **Performance Tab**
   The Performance tab shows the performance of the Model Portfolio over time compared to the FE fundinfo MPS sector. For more information about sectors, please see Section 4 of this guide.



3. Breakdown Tab

The Breakdown tab gives a high-level overview of the weightings for the Model Portfolio.



Fund Summary | Performance | Breakdown

Other Breakdown Information

Portfolio Turnover Ratio (%)	

Sector Weightings as at June 30, 2025

Rank	Change	Name	%
1	▶	FINANCIALS	22.10
2	▲	TELECOM, MEDIA & TECHNOLOGY	12.65
3	▼	CONSUMER PRODUCTS	11.72
4	▲	GOVERNMENT BONDS	11.41
5	▼	BASIC MATERIALS	10.35
6	▼	INDUSTRIALS	8.86
7	▼	ASSET/MORTGAGE-BACKED SECURITIES	6.96
8	▶	HEALTH CARE	6.38
9	▶	UTILITIES	2.02
10	▶	OTHERS	7.54

▼ Faller ▲ Riser ▶ No Change ■ New Entry

Region Weightings as at June 30, 2025

Rank	Change	Name	%
1	▶	NORTH AMERICA	39.23
2	▶	UK	25.81
3	▶	EUROPE EX UK	18.88
4	▶	PACIFIC BASIN	13.17
5	▶	INTERNATIONAL	1.92
6	▲	AMERICAS	1.81
7	▼	ASIA PACIFIC	1.48
8	▲	AUSTRALASIA	0.71
9	▼	JAPAN	0.62
10	▶	MIDDLE EAST/ AFRICA	0.52

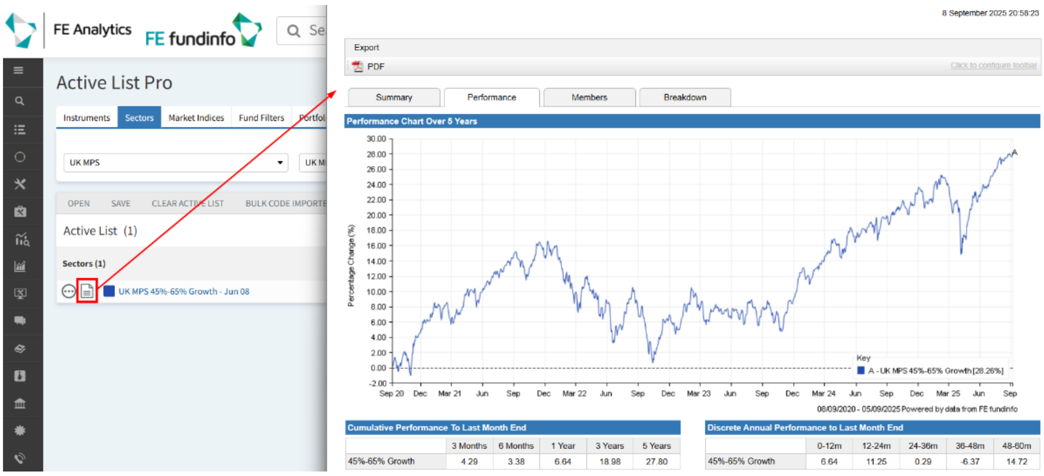
Please note: for a more detailed breakdown, you will need to complete the steps in Section 7 of this guide.

4. Sector Factsheet

As well as the '**Instruments**' tab, you can also use the '**Sectors**' tab to access the new UK MPS Portfolio peer groups – these have been newly created to match the preferences of investors, providing advisers with useful comparisons.

On the '**Sectors**' tab, select the '**UK MPS**' Universe and the sector from the dropdown, then add it to the Active List.

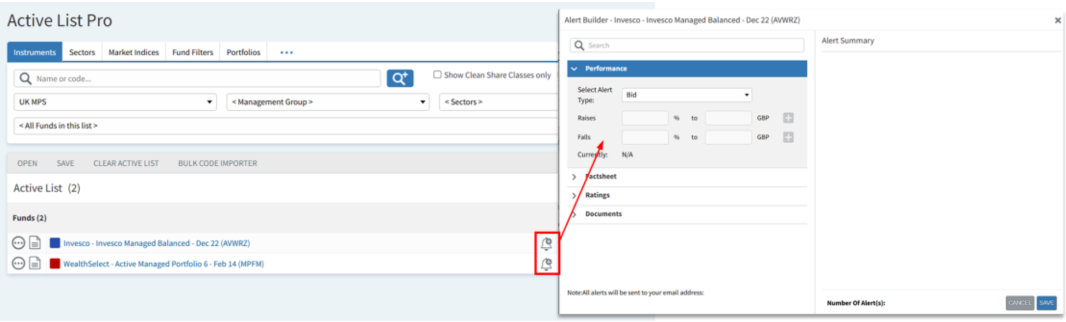
Once you have done this, you will be able to access the '**Sector Factsheet**' via the paper icon to the left of the sector name on the Active List.



Similarly to the Factsheet for the Model Portfolio, you can navigate to the different information by using the tabs at the top.

5. Alerts

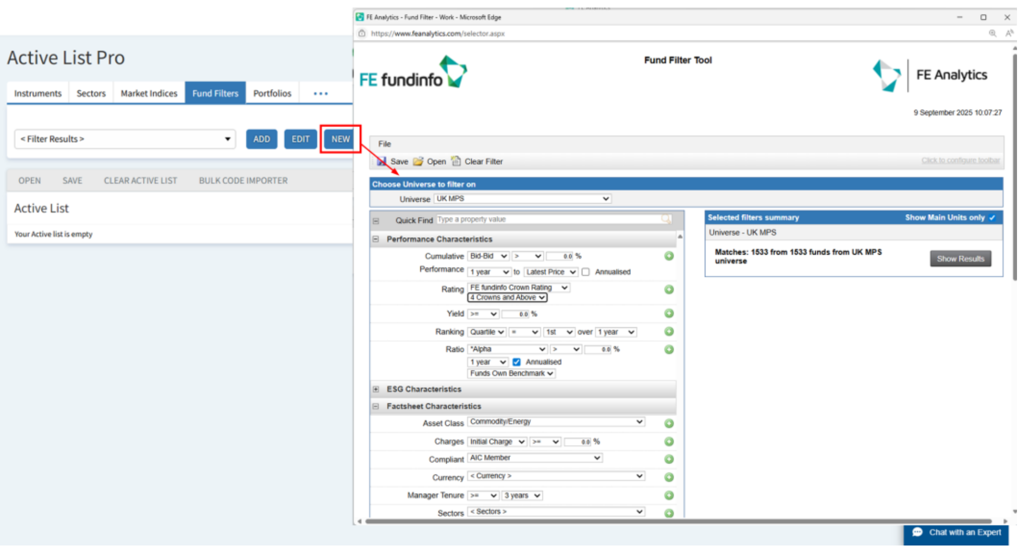
Additionally, from the Active List, you can set up custom alerts for your Model Portfolios. Using the bell icon, you can create custom Alerts which help keep you up to date with any changes to Model Portfolios, such as key new documentation, OCF changes or FE fundinfo Crown Ratings changes.



These alerts will be sent direct to the email address registered to your FE Analytics account.

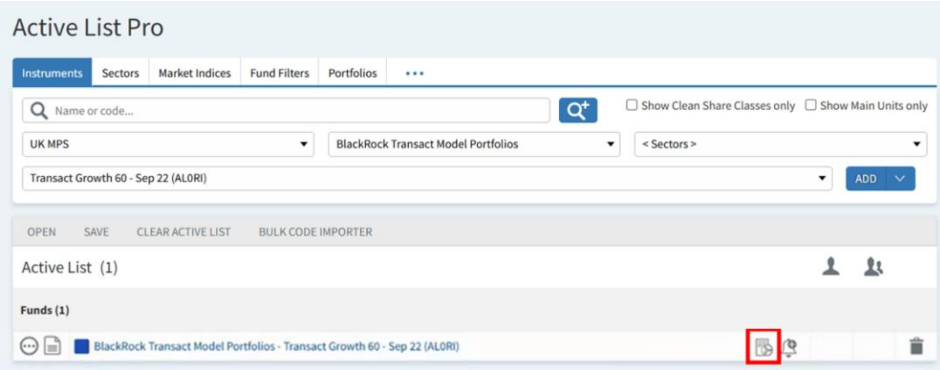
6. Fund Filter

The Fund Filter tool can also be used with the new UK MPS Universe. This tool allows you to search for funds using specific criteria, which now means you can narrow down your research to specific sectors (including the new MPS Universe sectors) as well as other criteria such as FE fundinfo Crown Ratings.

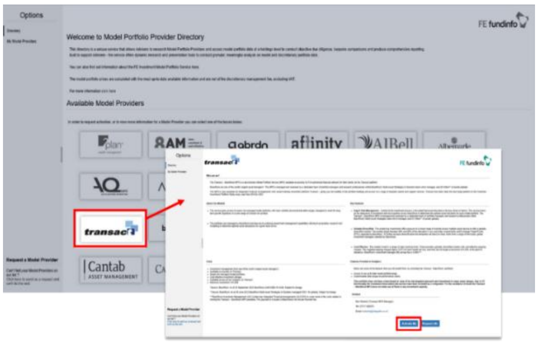


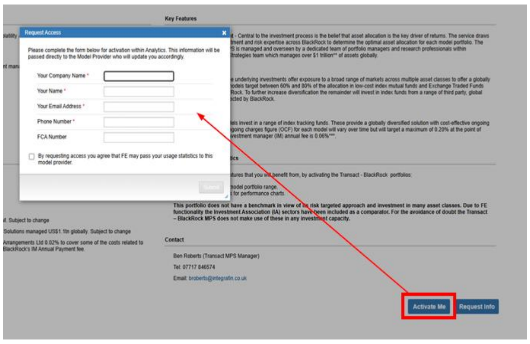
7. Access to richer data for Model Portfolios

For richer data and the ability to use the Model Portfolios with FE Analytics charts, tables and reports, you will need to request access to the MPS Directory for that provider. You will see an icon next to the Model Portfolio on the Active List that will take you to the MPS Directory:



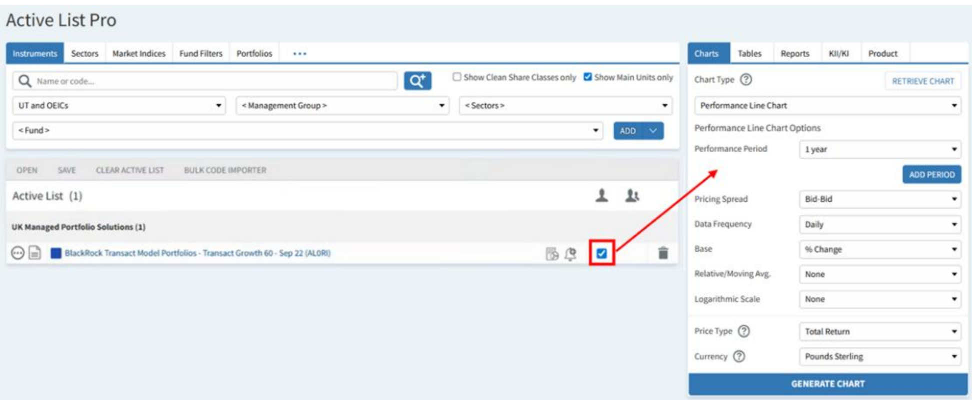
Once you have located the provider, click on the icon to be taken to a screen with more information about the provider as well as the option to ‘**Request Info**’ if you would like to know more.





If you require access, simply click the ‘**Activate Me**’ button, complete the form with your details and once your request has been approved by the provider themselves, the models will be available in FE Analytics (via the ‘**Portfolios**’ tab) for you to personalise your research via charts and tables.

After you have been authorised by the Provider, when you add the Model Portfolio to the Active List, you will see a tick box to the right of the model (shown below) that then enables you to select the Model Portfolio to be able to chart, table and report using the options on the right side of the screen.



Please note: This functionality is not available without MPS Directory activation.

For more information on the other tools in FE Analytics, please visit the '**Training & Guides**' section in the FE Analytics left-hand menu or visit the FE Analytics Training Academy website to view details of our training sessions.