

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)
- Precious Metals Portfolio (PRM)
- Short Term Bond Portfolio (STB)
- Special Operations Portfolio (Sop)
- 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 Ltd (MVAM), registered in England (Company no. 08600041) is authorised and regulated by the Financial Conduct Authority (registration no. 613008).



SHORT TERM BOND PORTFOLIO

WHO?

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

WHAT?

The primary objective of a Short-Term UK Government Bond Portfolio is to provide investors with a predictable income stream while preserving their capital.

Short-Term Bonds offer a fixed coupon rate, providing investors with a predictable income stream throughout the bond's lifespan.

WHY?

UK Government bonds, also known as gilts, are considered one of the safest investment options available because they are backed by the government's creditworthiness.

By investing solely in short-term gilts, investors can minimize their exposure to interest rate fluctuations and market volatility.

It may be suitable for investors who are seeking to generate a steady stream of income while minimizing their exposure risk in a consistent, repeatable strategy.

REWARDING RISK

The Short-Term Bond Portfolio is focused on obtaining a better return than cash after costs while having very low potential for loss. Investments will be made into government bonds that are less than three years and held to maturity, the portfolio may hold cash at times.

The associated risk is deemed to be **low** created by the stability of government bonds and their limited duration.

RETAIN ACCESS

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

KEY BENEFITS

- Clear reporting
- Money back usually within a week of receiving a redemption request

FAIR FEES

- No entry fees or exit fees
- Annual management charge of 0.3% including VAT
- Dealing fees will be charged