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

enquiries@mvam.com | www.mvam.com

MVAM FINANCIAL ADVICE

Dorking Branch
275 High Street
Dorking
Surrey, RH4 1RY
Tel: 01306 776999

York Branch
28 High Petergate,
York, YO1 7EH
Tel: 01904 929430

Hertford Branch
3 Port Hill
Hertford, SG14 1PG
Tel: 01992 310292

MVAM
FINANCIAL ADVICE

SPECIAL OPPORTUNITIES PORTFOLIO

WHO?

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

WHAT?

The primary objective of the portfolio is to select companies to capitalise on unique high potential opportunities that arrive unexpectedly in the financial markets. This is achieved by identifying companies where specific market communication suggests the share price does not fully reflect the future potential of the company.

The goal of this portfolio is to provide investors with a diversified source of capital appreciation. The Special Opportunities Portfolio may be suitable for investors who seek higher returns but accept a higher level of risk associated with focussed portfolios.

The portfolio typically targets 25-30 companies by applying a number of proven investment techniques to identify unique opportunities.

WHY?

The Special Opportunities Portfolio offers potential for strong returns. It is a focused portfolio, ensuring if a share disappoints the manager can sell it.

REWARDING RISK

If this sort of investment matches your risk profile, then the Special Opportunities Portfolio with MVAM is a vehicle that can make a difference to you and your dependent's future wealth.

This portfolio is considered **Adventurous Risk** and is suitable if you can withstand sharp fluctuations in the value of your investments in the short term.

This risk category is based on previous performance where there is a 10% chance of the portfolio falling more than 20% in the next twelve months.*

*This estimate uses the Value at Risk (VaR), a statistical technique used to measure and quantify the level of financial risk of an investment portfolio over a specific timeframe. VaR uses backward looking data and therefore may not cover all future eventualities.

www.mvam.com

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 1.25% including VAT
- Dealing fees will be charged