

AJ Bell Responsible Growth MPS

Aggregated target market information

AJ Bell Responsible Growth MPS	Objective	Target Market	Customers' knowledge and experience	Customers' financial situation with a focus on ability to bear losses	Customers' risk tolerance and compatibility of risk/reward profile of the product with the target market	Risk Indicator	Customers' objectives and needs	Customers who should not invest	Distribution channel
AJ Bell Responsible MPS1	The investment objective of the AJ Bell Responsible MPS 1 is to make a positive return when measured over a period of at least five years, this may be less than the level of inflation (as measured by the consumer price index). Over shorter periods the portfolio may lose value as it invests in securities that can go both up and down in price. The portfolio aims to have minimal exposure to companies generating sales from areas such as tobacco and alcohol, and higher exposure to companies with stronger environmental, governance or social practices (known as ESG).	UK retail advised digital investors who wish to invest according to ESG principles	Designed for use by investors with at least basic knowledge of investments which are to be managed in accordance with a specific investment objective and policy	Investors must be prepared to accept fluctuations in the value of capital including capital loss and accept the risks of investing in capital markets, including having the ability to bear 100% capital loss	Due to the volatility of markets and specific risks of investing in shares in an investment, investors should have a risk tolerance that is commensurate with the risk target of the portfolio in which they are invested	Risk indicator will be on the factsheet of the selected Potfolio(s)	Investors in the portfolios should aim to be invested for the medium to long term; defined as at least five years The portfolios are designed for investors that want to gain access to a portfolio managed according the investment objective and policy of the portfolio	Those who: 1. Have no risk tolerance 2. Need a guaranteed income or portfolio return 3. Have low financial resilience 4. Have low financial capability, except where there is a financial adviser 5. Have a time horizon shorter than five years	Investment advice
AJ Bell Responsible MPS2	The investment objective of the AJ Bell Responsible MPS 2 is to make an average return in line with inflation (as measured by the consumer price index) over a period of at least five years. Over shorter periods the portfolio may lose value as it invests in securities that can go both up and down in price. The portfolio aims to have minimal exposure to companies generating sales from areas such as tobacco and alcohol, and higher exposure to companies with stronger environmental, governance or social practices (known as ESG).								
AJ Bell Responsible MPS3	The investment objective of the AJ Bell Responsible MPS 3 is to make an average return at least in line with the level of inflation (as measured by the consumer price index) over a period of at least five years. Over shorter periods the portfolio may lose value, including sharp falls in certain market conditions, as it invests in securities that can go both up and down in price. The portfolio aims to have minimal exposure to companies generating sales from areas such as tobacco and alcohol, and higher exposure to companies with stronger environmental, governance or social practices (known as ESG).								
AJ Bell Responsible MPS4	The investment objective of the AJ Bell Responsible MPS 4 is to make an average return above the level of inflation (as measured by the consumer price index) over a period of at least five years. Over shorter periods the portfolio may lose value, including sharp falls in certain market conditions, as it invests in securities that can go both up and down in price. The portfolio aims to have minimal exposure to companies generating sales from areas such as tobacco and alcohol, and higher exposure to companies with stronger environmental, governance or social practices (known as ESG).								
AJ Bell Responsible MPS5	The investment objective of the AJ Bell Responsible MPS 5 is to make an average return above the level of inflation (as measured by the consumer price index) over a period of at least five years. In favourable market conditions returns may be higher. Over shorter periods the portfolio may suffer significant losses in capital value, as it invests in securities that can go both up and down in price, with large weights in emerging markets. The portfolio aims to have minimal exposure to companies generating sales from areas such as tobacco and alcohol, and higher exposure to companies with stronger environmental, governance or social practices (known as ESG).								
AJ Bell Responsible MPS6	The investment objective of AJ Bell Responsible MPS 6 is to make an average return substantially ahead of inflation (as measured by the consumer price index) over a period of at least five years. Over shorter periods the portfolio may suffer significant losses in capital value, as it invests in securities that can go both up and down in price, with large weights in emerging markets and high growth companies. The portfolio aims to have minimal exposure to companies generating sales from areas such as tobacco and alcohol, and higher exposure to companies with stronger environmental, governance or social practices (known as ESG).								