

INDEPENDENT MPS RESEARCH & OVERSIGHT



Institutional-grade MPS research, selection and oversight.

THE PROBLEM

The challenge facing financial advisers

100+ MPS providers

There are now over 100 MPS providers in the UK, with hundreds of portfolio ranges to choose from.

Shallow selection

Many selection processes rely too heavily on past returns or superficial ratings.

Hidden complexity

Understanding what sits beneath performance requires significant time and expertise.

Consumer Duty pressure

Consumer Duty now requires advisers to demonstrate robust selection, oversight and reporting.

THE SOLUTION

A better way to select and oversee MPS solutions

1

A curated universe

High-quality MPS providers, pre-screened and independently assessed - not a raw list of everything.

2

Deep, transparent analysis

Full visibility into underlying portfolios, including assessment of investment process and adviser support.

3

Ongoing monitoring

Structured oversight aligned to your CIP review cycle, so nothing slips through the gaps.

4

Automated reporting

Consumer Duty-ready outputs that reduce documentation time and support your governance framework.

What Bridge delivers

1. Selection

- Filter a curated universe of high-quality MPS solutions
- Focus on solutions that meet your firm's requirements
- Avoid being overwhelmed by the breadth of the market

2. Analysis

- Full transparency on holdings and asset allocation
- Understand what is actually driving performance
- Look beyond past returns to how portfolios are constructed

3. Monitoring

- Ongoing oversight of approved solutions
- Identify changes in positioning and risk
- Ensure portfolios remain aligned to expectations

4. Reporting

- Structured outputs to support governance
- Evidence for Consumer Duty and internal processes
- Reduce time spent producing documentation

OUR APPROACH

Built differently

Fully independent

Bridge does not take any payment from MPS providers. Our analysis is not influenced by commercial relationships - only by what is best for advisers and their clients.

Selective, not overwhelming

Rather than listing every available MPS, Bridge focuses on a curated set of high-quality solutions.

Institutional approach

Applying the same research standards used by large wealth managers - brought directly to independent advisory firms of all sizes.

A research partner, not just a platform

Bridge works alongside you - from initial selection through to ongoing oversight - with built-in messaging to support you at every stage.

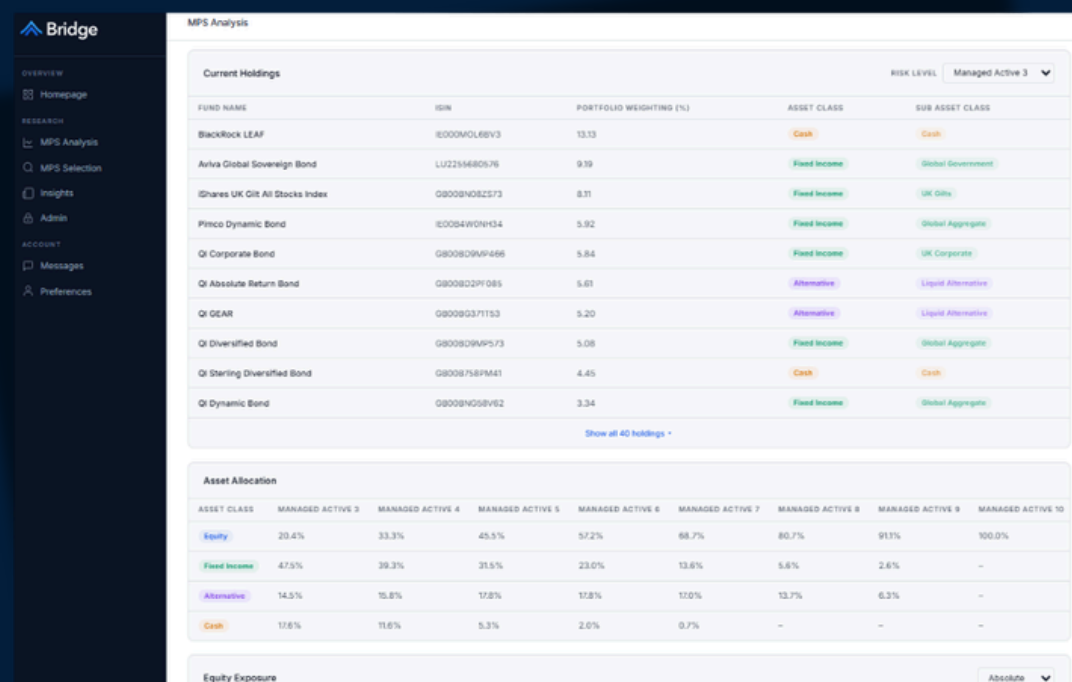
PLATFORM FEATURE

Understand how portfolios are positioned - today and over time

Bridge provides full transparency on how portfolios are constructed, allowing you to see both current positioning and how it has evolved over time.

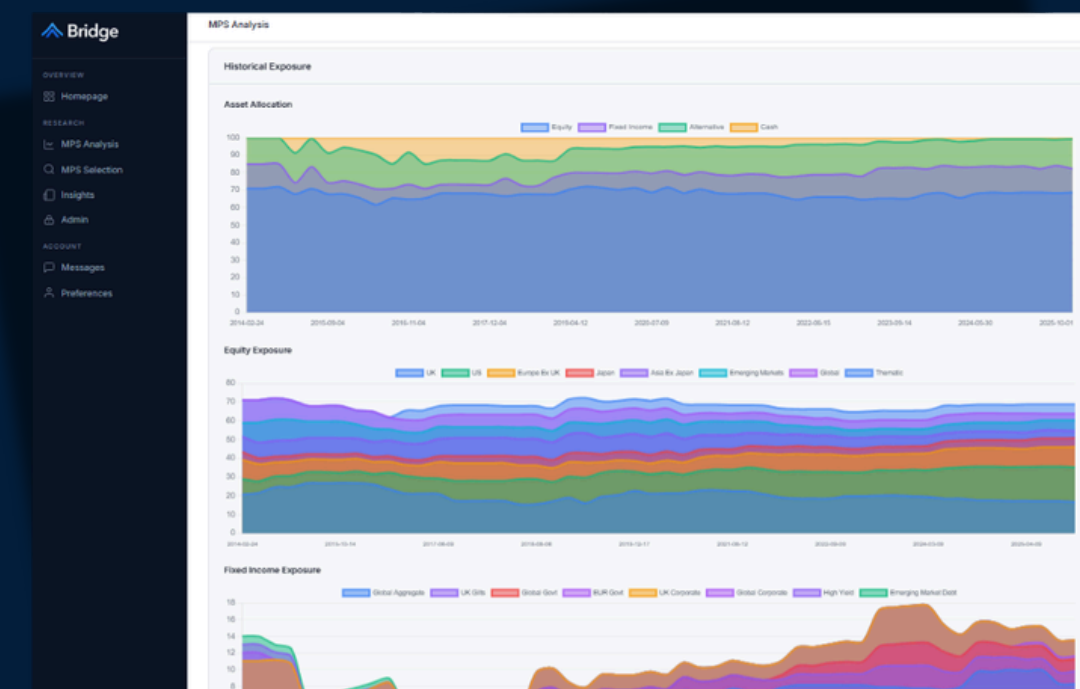
Current Exposure

Clear breakdown of full holdings, asset allocation and underlying exposures.



Historical Exposure

Understand how providers have navigated markets.



Structured reporting to support Consumer Duty requirements

Bridge helps advisers evidence both the selection and ongoing monitoring of investment solutions, with clear and structured outputs.

Ready-to-use outputs to support investment committees and file notes.

Clearly document rationale for selection and ongoing oversight.

The screenshot displays a web interface for a 'Consumer Duty Oversight Report'. At the top, there is a navigation menu with items: Overview, Investment Process, Current Exposure, Historical Exposure, Performance, Cost, Adviser Support, Quarterly Review, and Consumer Duty. Below the menu, the report title 'Consumer Duty Oversight Report' is shown, followed by a subtitle 'Document your selection rationale, suitability assessment, and ongoing monitoring for Qulter WealthSelect Managed Active' and an 'Export Report' button. The main content is organized into several sections:

- Provider Overview:** A table with the following data:

Provider	Qulter WealthSelect Managed Active
Investment Style	Active
Risk Levels	3, 4, 5, 6, 7, 8, 9, 10
Fee Range	0.63% - 0.81%
Platforms	AJ Bell Investcentre, Fidelity Adviser Solutions, M&G Wealth, Morningstar Wealth, Parmentier, Qulter, Transact
- 1. Selection Rationale:** A paragraph stating: 'Qulter WealthSelect Managed Active was selected following an independent assessment of the investment process, cost structure, platform availability, and alignment with our client segments. The proposition offers a comprehensive active managed solution across risk levels 3 to 10, available on 7 platforms.'
- 2. Target Market & Suitability:** A paragraph stating: 'This MPS range is suitable for clients seeking a professionally managed, diversified multi-asset portfolio with active fund selection. The range spans risk levels 3 to 10, making it appropriate for clients across cautious to adventurous risk profiles with a medium to long-term investment horizon.'
- 3. Fair Value Assessment:** A paragraph stating: 'The all-in fee range of 0.63% to 0.81% is assessed as representing fair value given the depth of the investment process, breadth of manager research, and the active management approach. The management fee of 0.15% is competitive within the active MPS universe.'
- 4. Ongoing Monitoring Summary:** A paragraph stating: 'Portfolios have been monitored on a quarterly basis. Performance has been reviewed against relevant IA sector benchmarks and peer groups. Asset allocation changes and fund selection decisions have been assessed for consistency with the stated investment approach.'
- 5. Actions & Conclusions:** A paragraph stating: 'Based on the current review, Qulter WealthSelect Managed Active remains appropriate for the target client segments identified above. No changes to the approved list are recommended at this time. Next review scheduled in accordance with our quarterly monitoring cadence.'

Led by real investment experience

Sam Buckingham, CFA

Founder, Bridge Investment Intelligence Ltd

- Built and managed multi-asset investment solutions at leading UK wealth managers.
- Overseen portfolios managing billions of pounds of client assets.
- Worked directly on fund selection, asset allocation and portfolio construction



Bringing institutional expertise into the adviser market.

Get in touch



info@bridgeii.com

www.bridgeii.com

020 8064 1202

