INDEPENDENT MPS RESEARCH & OVERSIGHT

Bridge

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.

Hidden complexity

Understanding what sits beneath performance requires significant time and expertise.

Shallow selection

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

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 curved 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.

PLATFORM OVERVIEW

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.

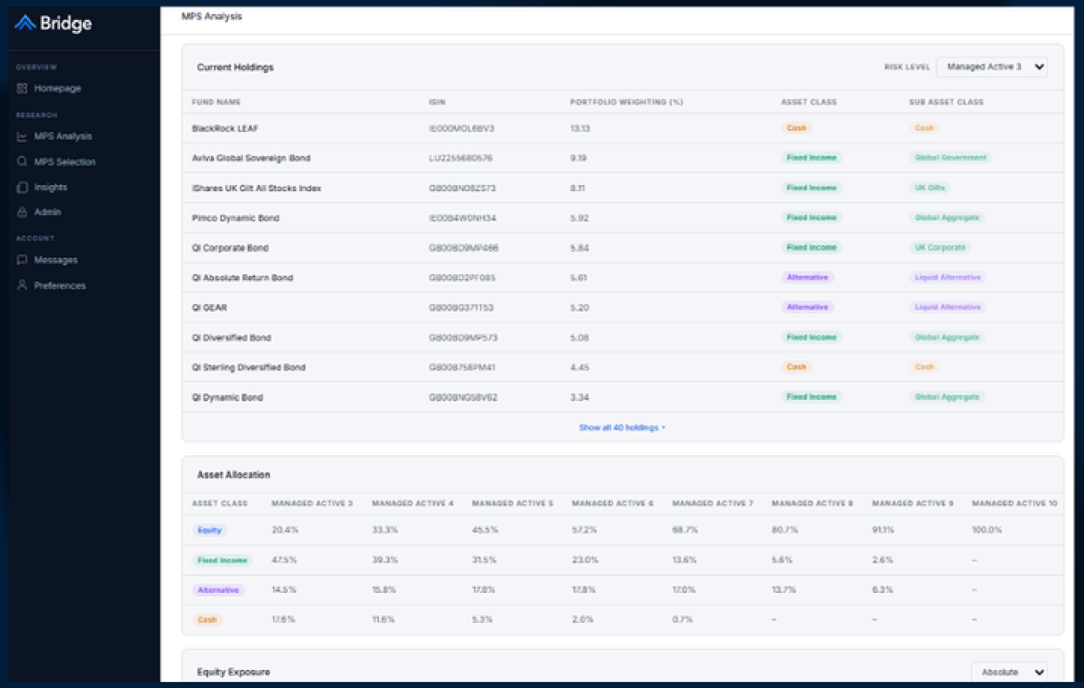
PLATFORM FEATURE

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.

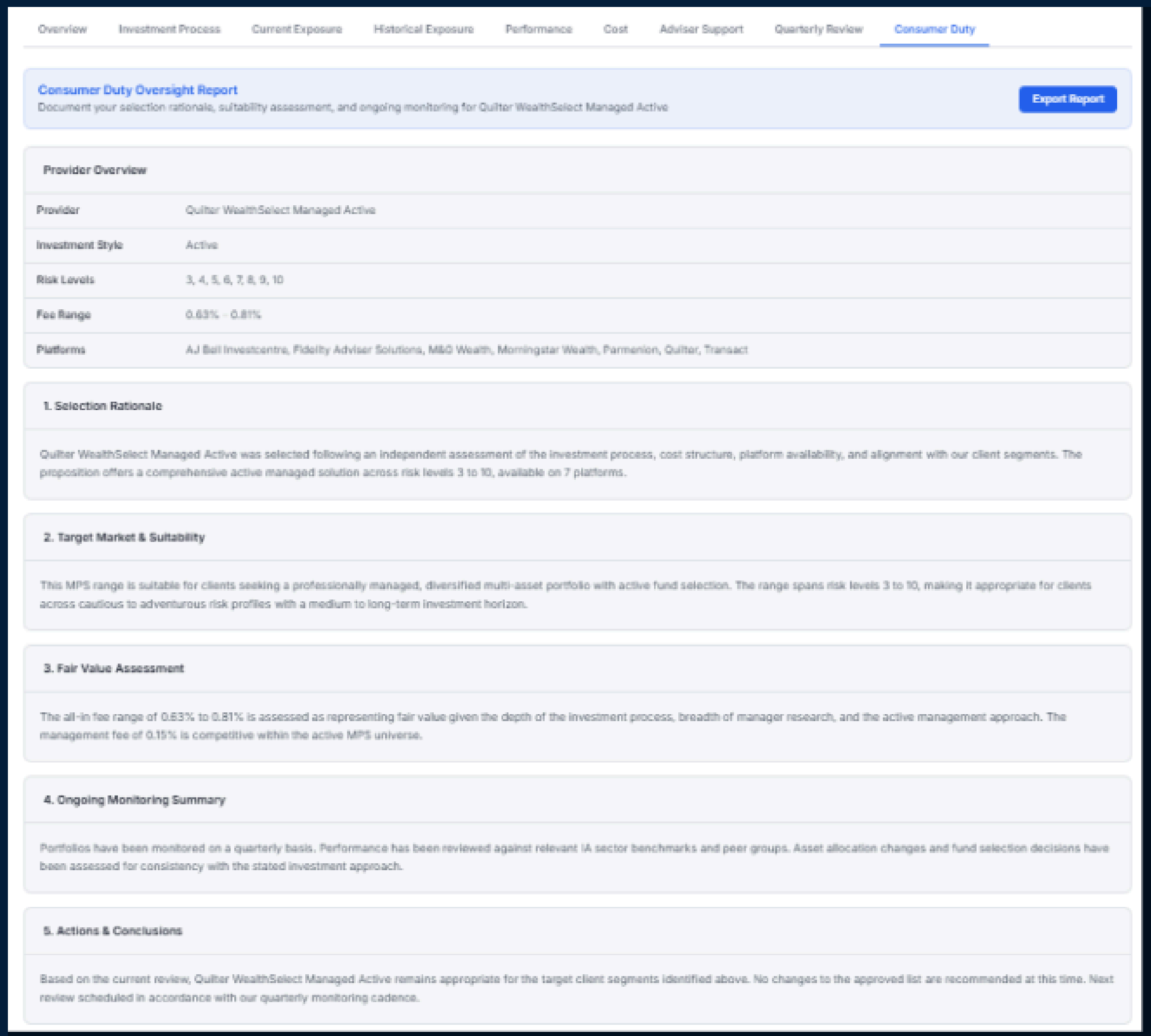
REGULATORY SUPPORT

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.



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

Bridge