



INTELLIGENTMONEY

PH RECOVERY

FACTSHEET – APRIL 2021

INVESTMENT OBJECTIVE

This portfolio aims to provide capital growth from a Covid-19 recovery investment strategy in stocks that we consider are fundamentally sound but are now available at a significant discount. The portfolio has full active management and this involves the selling down of stocks and return of capital at an individual level when they have met our criteria for their recovery prospects. It is important to remember that this portfolio is, by its nature, speculative.

INVESTMENT MANAGEMENT

Julian Penniston-Hill:



As Intelligent Money's Chief Executive, Julian is responsible for researching and establishing the stock selection and retention for PH Recovery.

Julian has 25 years of financial services experience having previously been Investment Management Director at Willis Owen, where he was responsible for generating and retaining £1bn of funds.

Will Dickson:



Will is responsible for implementing this strategy, advising upon and running the ongoing investment management on our behalf.

Will achieved an Accounting and Finance BSc from the University of Bath, an MSc in Finance and Investment from the University of Exeter and holds Chartered Wealth Manager status from the Chartered Institute of Securities and Investments.

He has been recognised by Citywire as one of the UK's top investment managers for three years in a row and is Chief Investment Officer at P1 Investment Management.

ASSET ALLOCATION



- Food & Beverage
- Travel & Leisure
- Consumer Products & Services
- Industrial Goods & Services
- Media
- Retail
- Cash

The value of investments and the income from them can fall as well as rise and past performance is no guarantee of future returns. You may not recover what you invest.