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Bordier (UK) secures rare triple for third consecutive year

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Specialist asset management firm Bordier (UK) has confirmed that it has achieved the maximum 5 Star Rating for discretionary propositions across all three of independent research agency Defaqto's Discretionary Fund Management (DFM) rating classes – for the third consecutive year.

It is one of just three firms to achieve this feat.

The announcement comes in the wake of its 2016 DFM audits, which Defaqto says represent “the most intensive sets of standardised screening that it has conducted on the DFM market.”

Commenting, Fraser Donaldson, Insight Analyst (Investments) at Defaqto said, “Bordier & Cie (UK) PLC have shown consistency in maintaining a suite of comprehensive intermediated discretionary propositions, given the 2016 DFM Star Rating criteria and methodology. They have continued to meet the higher standards that our 2016 DFM Star Ratings are designed to reflect in terms of characteristics and features, and they have demonstrated a high level of proposition transparency, adding to the integrity of the data provided to Defaqto.”

Bordier (UK) has been awarded the maximum 5 Star Rating for the following services:

- ‘MPS Platform’: the Bordier (UK) Platform Managed Portfolio Service, which offers cost-effective management of portfolios on a variety of platforms, via advisers;
- ‘MPS - Direct Custody’: the Bordier (UK) Managed Portfolio Service, which offers cost-effective management of portfolios;
- ‘Bespoke - Wealth Management Service’: the Bordier (UK) Wealth Management Service, which offers a bespoke discretionary portfolio management service for portfolios



Bordier (UK) Chief Executive Officer, Jamie MacLeod is delighted with the firm's retention of its ratings for a third consecutive year. "Our industry continues to attract new entrants and is becoming ever more overcrowded; that makes the task of identifying the right investment partner much harder than it should be. At Bordier (UK) we have opened ourselves up to companies like Defaqto, ARC and Distribution Technology, and we continue to make significant efforts to make the intermediary's task in selecting the right partner that little bit easier.

"We subscribe our investment performance data to ARC; the independent ratings agency's 'Suggestus' service provides an impartial view of investment managers, and as it is backed up by hard data, this is proving to be an invaluable tool for intermediaries in the manager selection process. We took the decision to subscribe our investment data to ARC in 2012 in the spirit of transparency and have subsequently been awarded the coveted ARC 'Approved Due Diligence Kitemark' and '3D Award'. Our investment performance (as judged by ARC) was again outstanding in 2015 and the retention of our trio of Defaqto 5 Star Ratings for a third consecutive year further underlines the credibility of the Bordier (UK) proposition."