# Growth Strategy

Factsheet

ROCQ CAPITAL GROWTH

## Background

A predominantly equity-based strategy focused on achieving long-term capital growth.
Supported by selective allocations to fixed income and alternatives, this approach is designed for investors with a higher risk tolerance who are comfortable with greater short-term market fluctuations.

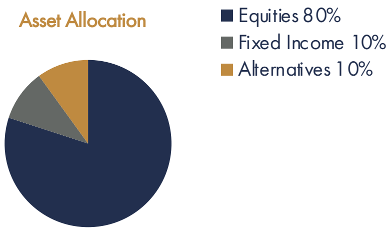
## Philosophy

We believe in careful research, robust risk management and straightforward communication.
As an independent firm, we select all investments solely on their merits and contribution to portfolio outcomes.

## Investment Process

1. **Macro-Economic Analysis**
   An assessment of economic conditions shaping the environment in which our investment strategies operate. We move from high-level global analysis and narrow to regions and sectors.
2. **Strategic Asset Allocation**
   Longer-term allocations in equities, bonds or credit and alternatives across our strategies, reviewed periodically or when structural changes occur within markets.
3. **Tactical Allocation**
   Short to medium term portfolio adjustments implemented when opportunities present themselves.
4. **Portfolio Construction**
   The careful structuring of portfolios to achieve an appropriate balance between risk and reward, aligned with clients' risk tolerances.
5. **Investment Selection**
   Thorough analysis and continuous review of investments across broad and specialist groups.
   Our aim is to ensure each investment remains highly competitive within its category and complements overall portfolio construction.

## Asset Allocation




## ESG Considerations

We consider environmental, social and governance (ESG) factors within the investment process. However, investments are not excluded solely on the basis of their SFDR classification unless the portfolio has a specific ethical or ESG mandate.

**Asset Class:** Multi Asset

**Base Currency:** GBP

**Target Return:** Cash + 6% to 8%

**Horizon:** 5 Years +

**Risk:** Higher

**Minimum Investment:** £10,000

## Liquidity

The majority of holdings offer daily liquidity, although a small number may trade weekly. We only invest in strategies where the underlying asset pool provides an appropriate level of liquidity.

## Investment Team

**John de Garis**
Managing Director

**Harry Bazzaz**
Chief Investment Officer

**CJ Peatfield**
Investment Manager

**Daniel Marquis**
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