Our Fund Selection Process

Here at Informed Choice we have constructed a comprehensive investment research process to determine the most suitable funds for each of our recommended asset classes.

Our fund selection process uses proprietary fund analysis software which is not available directly to the public. Unlike some other IFA firms we do not rely on online research tools that are available to the public to conduct our fund selection.

Academic research tells us that it is simply not possible to consistently select the 'best' investment funds or identify 'star' fund managers. Our research process aims to find investment funds that are most likely to deliver consistent performance.

We start with the entire universe of collective investment funds. These are divided into the relevant IMA sectors before we apply our research criteria to each and every fund. Funds that demonstrate risk managed returns combined with a low total expense ratio are typically preferred by this research process.

In addition to this formal research process, we are fortunate to have regular contact with all of the leading fund management groups and their managers. The high profile status of our firm and directors gives us a degree of access to those individuals in the fund management business who will not typically engage directly with other IFA firms.

Those funds that meet our research criteria are included within our preferred fund panels for each IMA sector.

Any fund on our fund panel is kept under regular review and breaking news about the fund or manager will prompt an immediate ad-hoc review.

Our preferred fund panels are reviewed in detail each and every quarter by the Informed Choice Investment Committee. Changes are then applied to client portfolios, with their permission, at the time of their next review.

T: 01483 274566 I F: 01483 274640 I W: www.icl-ifa.co.uk
Informed Choice Ltd, Sundial House, 20 High St, Cranleigh, Surrey, GU6 8AE