MPI

A STEP Member Service

Strategy Information

Strategy Name

Please complete a separate form for each Strategy, Fund or Model for which you submit data.

Description

Please provide details of this investment strategy and its objectives

Currencies

Please indicate the currency of the strategy. You may tick more than one if you are submitting data for multiple currencies.

GBP	
USD	
EUR	

Portfolio Types

Please indicate the type of strategy you are submitting below.

Bespoke	*Portfolios which follow a defined strategy or house view but which can be tailored to specific investment requirements or restrictions.*	
Centralised	*A segregated portfolio offered direct to clients where all portfolio are traded in line with a central strategy or model. Clients can be assured that the performance of all portfolios at a given level of risk are identical.*	
MPS	*A centralised investment process as above but which is made available via one or more online advisor platforms.*	
Fund	*A collective investment scheme such as an OEIC or SICAV*	

Mandate

Please enter a name and details of each mandate you run under this strategy and indicate which risk category it should be mapped to.

Name	Description (optional)	MPI Risk Category