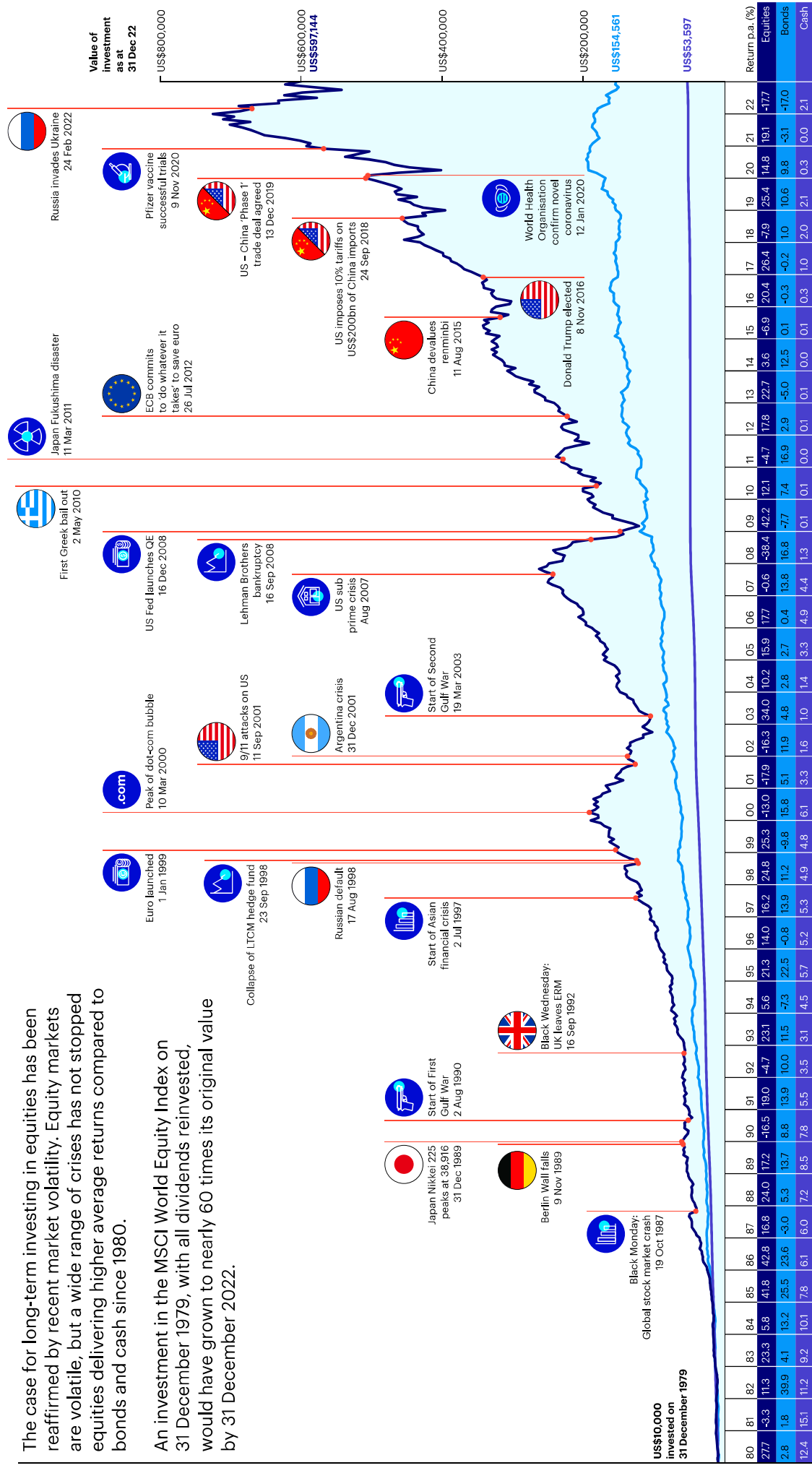


# A long-term approach to equity investing

The case for long-term investing in equities has been reaffirmed by recent market volatility. Equity markets are volatile, but a wide range of crises has not stopped equities delivering higher average returns compared to bonds and cash since 1980.

An investment in the MSCI World Equity Index on 31 December 1979, with all dividends reinvested, would have grown to nearly 60 times its original value by 31 December 2022.



Past performance is not a guide to future returns. Source: Datastream. All data are to 31 December 2022. Equities are represented by the MSCI World Equity Index in US\$ terms with all dividends reinvested. Bonds are represented by US 10-year Treasury bonds with all income reinvested. Cash is represented by US three-month Treasury bills with all proceeds reinvested.

# Turn our expertise into your edge

Invesco's heritage in managing multi asset investments for our UK clients goes back over 25 years. Our risk-targeted Summit Growth Range, Summit Responsible Range, and Model Portfolio Service are globally diversified across a variety of asset classes and markets to better navigate volatile times.

Each range is made up of multiple diversified portfolios which are risk rated by the major risk profilers, including Defaqto, FinaMetrica and Synaptic.

Scan the QR codes below to visit the [Invesco website](#) and learn more about each of these portfolio ranges, as well as the investment teams that manage them.



## Invesco Summit Growth Range

- Five multi asset funds
- A blend of 20–30 active and passive Invesco funds
- Highly diversified across asset classes, investing in 80+ countries, 11 sectors and 3500+ holdings<sup>2</sup>
- OCFs<sup>1</sup> starting from 0.40%

Find out more



## Invesco Summit Responsible Range

- Five multi asset funds
- 100% responsible investments via a blend of Invesco's ESG-focused ETFs<sup>3</sup>
- A 'market like' experience, with only 2.2% tracking error<sup>2</sup>
- OCFs<sup>1</sup> starting from 0.25%

Find out more



## Invesco Model Portfolio Service

- Nine growth and three income-focused advisory portfolios
- 0% annual MPS charge to your clients<sup>4</sup>
- A blend of active and passive funds from multiple asset managers
- OCFs<sup>1</sup> starting from 0.52%

Find out more



## Investment risks

The value of investments and any income will fluctuate (this may partly be the result of exchange rate fluctuations) and investors may not get back the full amount invested.

## Important information

This document is for Professional Clients and is not for consumer use.

- 1 OCF = Ongoing Charges Figure (annual charge).
- 2 On average across the range.
- 3 Invesco Summit Responsible funds aim to invest 100% of their assets (excluding cash) in investments meeting certain ESG criteria. Further information can be found in the Prospectus and Key Information Document.
- 4 Your clients pay no MPS charge – they only pay the OCFs of the underlying funds, the relevant platform charge and your advice fee. For access to our models, research and ongoing support, your firm instead pays a maximum monthly subscription of £70 + VAT.

All information as at 31 December 2022 and sourced by Invesco unless otherwise stated.

Where individuals or the business have expressed opinions, they are based on current market conditions, they may differ from those of other investment professionals and are subject to change without notice.

This document is marketing material and is not intended as a recommendation to invest in any particular asset class, security or strategy. Regulatory requirements that require impartiality of investment/investment strategy recommendations are therefore not applicable nor are any prohibitions to trade before publication.

For the most up to date information on the funds, please refer to the relevant fund and share class specific Key Information Documents, the Supplementary Information Document, the ICVC ISA Terms and Conditions, the Annual or Interim Reports and the Prospectus, which are available using the contact details shown.

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