

AWARDS AND RATINGS

Validation of the PortfolioMetrix Proposition



PMIX

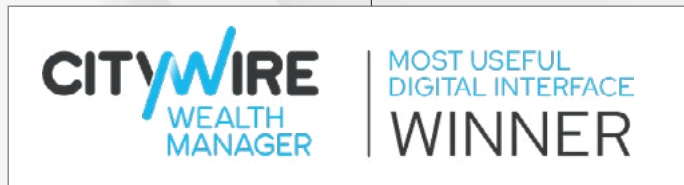
Awarded by Advisers



WINNERS

More than 600 advisers took part to score the DFM's they work with across 10 different criteria.

2023



2022



SHORTLISTINGS

Best DFM - London, Best DFM - East and South East, Best Availability of Sustainable Investment Strategies, Best Reporting, Best Communications in a Crisis



SHORTLISTINGS

Investment Outcome, ESG Availability, Reporting, Digital Interface, Communication in a Crisis

Awarded by Industry



WINNER



**Best Risk Profiling
Service**

Best Client Engagement

Professional Adviser

**AWARDS
2021**

**Best Model
Portfolio Service**



**Best Discretionary
Fund Manager**

**Best Client Engagement
(Providers)**

Professional Adviser

**AWARDS
2020**

**Best Client
Engagement**

The awards were determined by independent judging panels composed of an appropriate mix of financial advisers, business consultants, fund researchers, platform specialists and other financial services sector experts.

Shortlistings



**Adviser Technology
Provider of the Year**

**Best Discretionary
Fund Manager**

Schroders



**UK
PLATFORM
AWARDS
2022**

**Leading Independent Planning
Tool Provider**

**Best Use of Platform
technology**

**PORTFOLIO ADVISER
WEALTH PARTNERSHIP
AWARDS 2022**

**Client Services Team of the
Year**

ESG Advocate of the Year



SHORTLISTED

Independent Ratings

5 Star Rating

A 5-Star Rating means that our DFM MPS on Platform service is considered to be one of the highest quality offerings on the market.



5 Diamond Rating

The top Diamond Rating for our DFM Model Portfolio family means that we are offering our clients a best in class proposition relative to our peer group in areas such as charges, performance and risk shape.

PMX is a signatory to the following bodies





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