

Value Assessment outcomes

Summary

Parmenion has completed Value Assessments for our products/services and investment solutions (as at 31st March 2023). We've analysed the benefits these provide, alongside a range of internal criteria and comparative market information. On the basis of this analysis, we've concluded our products/services and investments solutions are offering fair value for investors.

Our products/services

- Our platform
- ISA
- SIPP
- Interact

In completing these assessments we've considered the following criteria:

- Price comparisons with selected competitors at a range of case sizes
- Customer usage of product features and functionality
- Customer service levels and support metrics
- Complaint data, trends and customer feedback
- Client & account analysis and characteristics

Our in-house investment solutions

- PIM Strategic Multi Option
- PIM Strategic Multi Option XP
- PIM Strategic Active
- PIM Strategic Passive
- PIM Strategic Conviction
- PIM Tactical Active
- PIM Tactical Passive
- Distribution Technology Multi Option
- Distribution Technology Passive
- Distribution Technology 50% Active/50% Passive
- Parmenion with Morningstar – Active
- Parmenion with Morningstar – Passive
- PIM Strategic Multi Option Value & Small Cap: UK Perspective
- PIM Strategic Multi Option Value & Small Cap: Global Perspective
- PIM Strategic Multi Option Value & Small Cap: Global Tilt
- Vanguard Focus LifeStrategy Portfolios
- PIM Strategic Ethical Active – Profile A
- PIM Strategic Ethical Active – Profile B
- PIM Strategic Ethical Active – Profile C
- PIM Strategic Ethical Active – Profile D
- PIM Strategic Passive ESG
- PIM Tactical Income Solution
- PIM Strategic Guardian
- PIM Sterling Solution
- DFA Core Wealth Models
- DFA Core Plus Wealth Models

In completing these assessments we've considered the following criteria:

- Performance alignment with risk
- Volatility alignment with risk
- Costs versus peers
- Performance versus peers
- Service levels
- Adherence to solution mandate
- Adherence to risk framework

Get in touch

If you'd like to chat to us about our approach to Consumer Duty, please get in touch.

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