**INVESTMENT OBJECTIVE**
Fundamental Asset Management offers a dedicated focused portfolio, investing in small and mid-cap quoted companies including those quoted on the junior market of the London Stock Exchange, AIM.

Fundamental’s rigorous in-house investment research process profits from the plentiful mispricing opportunities within the smaller end of the UK stock market.

**ABOUT FUNDAMENTAL**
Fundamental Asset Management Limited, established in March 2004 by Christopher Boxall and Stephen Drabwell, is a leading specialist investment management company focussing on the UK small cap sector, particularly AIM, the world’s leading international growth market.

The investment management team at Fundamental have established an outstanding reputation and track record in managing small and mid-cap equity portfolios and providing bespoke investment solutions for private clients, trusts and institutions.

**Example Positions**
- AB Dynamics
- Fulcrum Utility Services
- Advanced Medical Solutions
- Quartix Holdings
- Craneware
- RWS Holdings
- Focusrite
- XP Power

**Cumulative Performance**
- 1m: 0.02%
- 3m: 6.31%
- YTD: 6.31%
- 5 yrs: 60.27%

**Discrete Performance**
- 31/12/12: 55.06%
- 31/12/13: 0.91%
- 31/12/14: 21.99%
- 31/12/15: 9.94%
- 31/12/16: 27.51%
- 31/12/17: -10.81%

**SECTOR BREAKDOWN**

**IMPORANT INFORMATION**
This factsheet is for illustration purposes only. The performance shown in this factsheet is based on a real client portfolio managed since 1st March 2007. Fundamental Asset Management Limited researches a material number of AIM stocks for the IHT Planning Portfolio Service. Our preferred stocks change as news flow and events impact on the companies and accordingly the composition of individual client portfolios may materially differ from another.

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