

ThePortfolioPlatform

The Index Beating Investment



The problem with the traditional
wealth management model



Longer term:

When you look at mutual fund performance over the long run, you can see a trend of actively-managed funds underperforming the S&P500 index.

A common statistic is that the S&P500 outperforms 80% of mutual funds.



“ IN 2022 only 13.8% of UK funds outperformed the FTSE All Share and Vanguard FTSE UK All Share indices, compared to 37.7% in 2021 and 39.2% over the last ten years

UNDERPERFORMING REQUIRES 3 CONSECUTIVE YEARS OF WORSE RESULTS THAN THE BENCHMARK, BUT ALSO BY AT LEAST 5% OVER THAT 3 YEAR PERIOD.

”

It's not just in the UK. In 2021, 81% of active managers in the US failed to compete with the index. They did fair better in 2022 with one of their best performances on record: only 60% failed to perform.



Over paying for poor performance:

UK investors have paid a shocking **£463m in fees in exchange for terrible returns over the past three years**, analysis from Bestinvest shows.

Investors spend around £115m in annual fees for funds that do not perform as well as a simple index tracker.



Why?



Just
imagine

A 3D rendered scene of a person standing in a hallway. The person is a simple, dark-colored figure. The hallway is composed of dark blue and teal rectangular blocks, creating a sense of depth and perspective. A bright yellow rectangle is positioned in the top right corner of the image. The text "The Solution:" is overlaid in the lower-left quadrant in a white, sans-serif font.


The Solution:



ThePortfolioPlatform



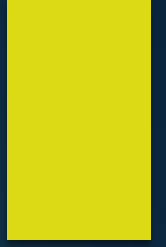
Are Fund
Managers
Capable?



Why
Listen to
TPP?

Performance:

Theory v Reality



QQQ	SPKX	BTC/USD	DIA	GLD	TLT	Search Tickers
317.59	16.83	30352.44	338.26	189.50	106.47	
▲ 1.45%	▲ 3.52%	▲ 1.247%	▲ 0.49%	▲ 1.23%	▼ 0.39%	

Revolutionary Investment Platform 'The Portfolio Platform' Offers Access to Hedge Fund Strategies to Everyday Investors

by AB Digital, Inc.

March 27, 2023 2:49 PM | 3 min read



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Why You Should Choose The Portfolio Platform

© 17 March 2023, 11:21

Source - LSE Non-Regulatory



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Reach Non Regulatory Reach Announcement

THE PORTFOLIO PLATFORM- THE BEST OF BOTH WORLDS.

Released 11:23:18 24 November 2021

RNS Number : 4705T
Efinancial Newsletter
24 November 2021

This is why you should work with The Portfolio Platform

If your portfolio is with an old-fashioned Investment/Wealth manager then you lost money over the last week. Why? Because the traditional model operates by placing your money in the market and moving on to the next client.

What the market is saying.



Is This Even
Possible?

FTSE Trader

(135433613)

FTSE MKT TRADER

Started: 05/2021 | Futures | Last trade: Today

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Trading Category: Futures

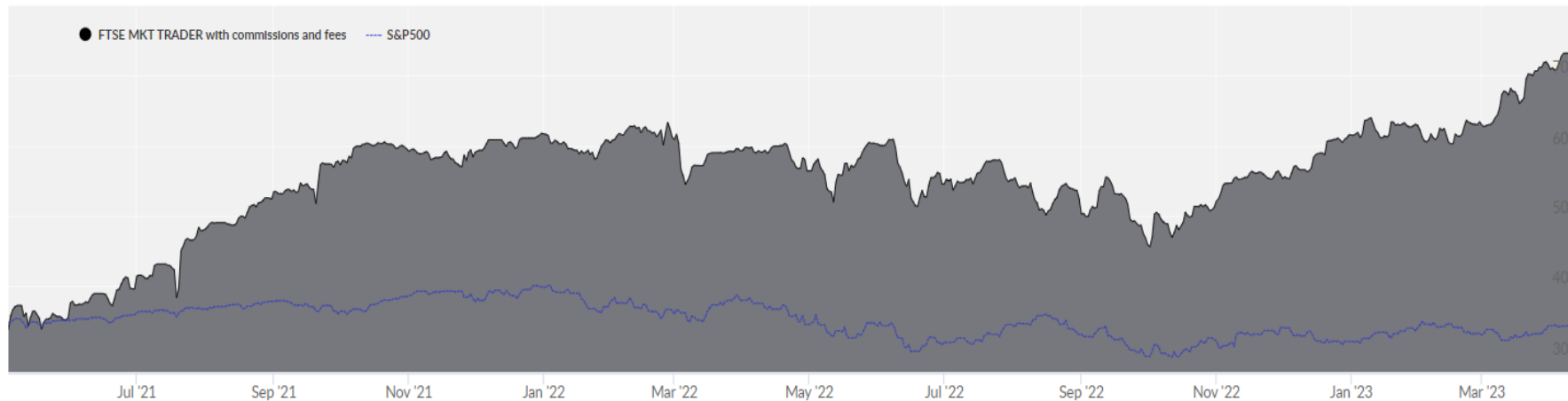
Financials / Indexes

45.8% Annual Return (Compounded)	(28.9%) Max Drawdown	204 Num Trades	77.9% Win Trades	2.0 : 1 Profit Factor	70.8% Win Months
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Hypothetical Monthly Returns (includes system fee and Interactive Brokers commissions and fees)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD
2021					+7.8%	+5.3%	+20.8%	+10.0%	+7.8%	+4.7%	(0.3%)	+3.8%	+76.1%
2022	(2%)	+1.6%	(3.5%)	(4.7%)	+6.9%	(10.6%)	+2.4%	(6.7%)	(11%)	+12.4%	+6.4%	+12.1%	(0.2%)
2023	+1.4%	+1.5%	+12.0%	+3.0%									+18.7%

Hypothetical Performance



SUMMARY STATISTICS

Strategy began	2021-05-04
Suggested Minimum Capital [Ⓞ]	\$70,000
# Trades	204
# Profitable	159
% Profitable	77.9%
Correlation S&P500	0.231
Sharpe Ratio	1.27
Sortino Ratio	2.03
Beta	0.32
Alpha	0.12
Leverage [Ⓜ]	2.18 Average, 9.53 Maximum

[Download CSV](#)[Long](#)[Short](#)[Both](#)[Win](#)[Loss](#)[Both](#)

	Opened Date/Time	Symbol	Description	Side	Qty	Avg Price	Closed Date/Time	Avg Price	Drawdown	P/L
	4/5/23 14:52	@MESM3	MICRO E-MINI S&P 500	LONG	2	4112.15	4/11 2:17	4141.84	0.14%	\$295
	4/6/23 10:36	@MNQM3	MICRO E-MINI NASDAQ 100	LONG	1	13047.74	4/10 18:32	13166.88	0.22%	\$237
	4/4/23 13:20	LFM3	FTSE 100 INDEX	LONG	1	7638.2	4/6 10:36	7734.2	0.17%	\$1,186
	3/30/23 15:52	@MESM3	MICRO E-MINI S&P 500	SHORT	4	4126.50	4/5 14:52	4115.97	1.23%	\$207
	3/28/23 4:50	@M2KM3	MICRO E-MINI RUSSELL 2000	SHORT	1	1767.63	4/5 10:41	1761.36	0.42%	\$30
	3/17/23 5:58	LFM3	FTSE 100 INDEX	LONG	1	7474.5	3/29 14:12	7558.4	5.11%	\$1,025
	3/24/23 7:51	@MESM3	MICRO E-MINI S&P 500	LONG	1	3944.25	3/28 4:50	4005.50	0.05%	\$305
	3/23/23 10:58	@MESM3	MICRO E-MINI S&P 500	SHORT	1	4027.76	3/24 7:51	3943.64	0.08%	\$420
	3/22/23 3:09	@MYMM3	MICRO E-MINI DOW	SHORT	2	32796	3/24 7:51	31983	0.18%	\$811
	3/22/23 3:08	@M2KM3	MICRO E-MINI RUSSELL 2000	SHORT	1	1792.74	3/24 7:51	1709.24	0.04%	\$416
	3/17/23 7:46	@MESM3	MICRO E-MINI S&P 500	LONG	2	3964.87	3/21 15:49	4012.18	0.4%	\$471
	3/17/23 9:13	@MYMM3	MICRO E-MINI DOW	LONG	2	32170	3/21 15:49	32631	0.34%	\$459
	3/15/23 8:06	@MESH3	MICRO E-MINI S&P 500	SHORT	1	3845.49	3/17 5:58	3965.05	0.95%	(\$599)
	3/15/23 7:11	LFH3	FTSE 100 INDEX	LONG	1	7459.0	3/17 5:58	7475.4	2.69%	\$191
	3/13/23 5:39	@M2KH3	MICRO E-MINI RUSSELL 2000	LONG	1	1762.90	3/17 5:58	1770.83	0.35%	\$39
	3/13/23 4:52	@MYMH3	MICRO E-MINI DOW	LONG	1	32022	3/16 15:57	32248	0.37%	\$112
	3/13/23 2:52	@MNQH3	MICRO E-MINI NASDAQ 100	LONG	2	12086.58	3/15 15:53	12189.46	2.46%	\$410
	3/13/23 9:23	@MESH3	MICRO E-MINI S&P 500	LONG	1	3836.70	3/14 16:59	3921.93	0.2%	\$425
	3/10/23 9:19	@MYMH3	MICRO E-MINI DOW	SHORT	1	32158	3/13 4:52	32046	0.21%	\$55
	1/20/23 4:57	LFH3	FTSE 100 INDEX	SHORT	1	7750.5	3/10 13:27	7686.4	5.47%	\$764
	3/9/23 10:51	@MNQH3	MICRO E-MINI NASDAQ 100	SHORT	1	12331.53	3/10 2:23	11988.31	n/a	\$685
	3/2/23 15:19	@M2KH3	MICRO E-MINI RUSSELL 2000	SHORT	1	1900.99	3/9 7:58	1874.10	0.28%	\$133
	3/6/23 2:40	@MYMH3	MICRO E-MINI DOW	SHORT	1	33421	3/7 15:56	32865	0.13%	\$277

Cambridge Futures

CAMBRIDGE FUTURES

Started: 09/2020 | Futures | Last trade: 12 days ago

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Trading Category: Futures

Financials /
Indexes

44.5%

Annual Return (Compounded)

(27.7%)

Max Drawdown

162

Num Trades

74.7%

Win Trades

1.7 :1

Profit Factor

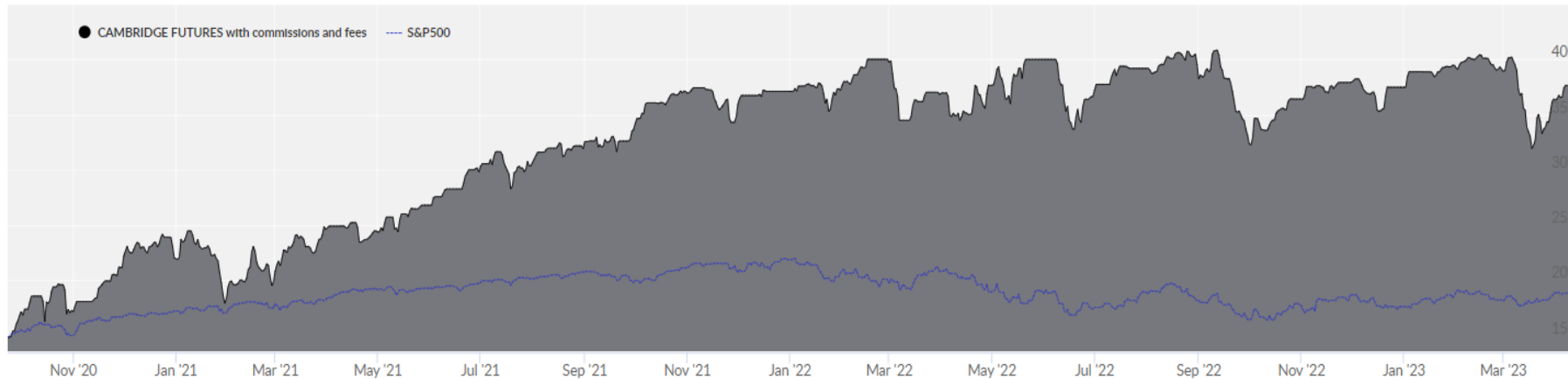
68.8%

Win Months

Hypothetical Monthly Returns (includes system fee and Interactive Brokers commissions and fees)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD
2020									+13.8%	+1.2%	+23.8%	+2.3%	+46.0%
2021	(14.6%)	+8.0%	+21.0%	(0.2%)	+10.0%	+11.2%	+1.9%	+5.7%	+5.4%	+9.6%	(4.1%)	+4.3%	+69.6%
2022	+0.8%	+7.0%	(7.9%)	+2.1%	+6.3%	(8.4%)	+7.0%	(1.1%)	(16.6%)	+12.6%	+4.1%	(1.1%)	+1.0%
2023	+4.9%	(0.9%)	(6.8%)	+6.2%									+3.0%

Hypothetical Performance



SUMMARY STATISTICS

Strategy began	2020-09-23
Suggested Minimum Capital ⓘ	\$40,000
# Trades	162
# Profitable	121
% Profitable	74.7%
Correlation S&P500	0.309
Sharpe Ratio	1.12
Sortino Ratio	1.63
Beta	0.49
Alpha	0.10
Leverage ⓘ	2.80 Average 9.14 Maximum

Leveraged FTSE Tracker

(130413233)

TPC FTSE TRACKER X 3

Started: 08/2020 | Futures | Last trade: 26 days ago | Promote

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Trading Category: **Futures**



Financials / Indexes

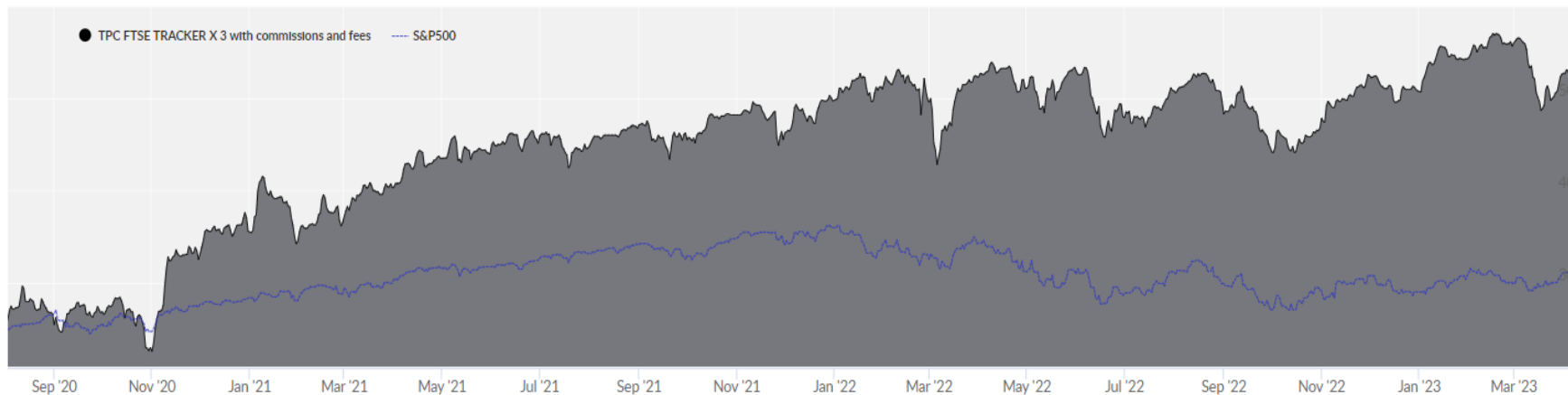
Change this

33.9% Annual Return (Compounded)	(27.0%) Max Drawdown	19 Num Trades	89.5% Win Trades	6.5 : 1 Profit Factor	63.6% Win Months
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Hypothetical Monthly Returns (includes system fee and Interactive Brokers commissions and fees)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD
2020								+4.6%	+3.0%	(14.8%)	+41.2%	+9.2%	+41.7%
2021	(1.7%)	+5.3%	+9.2%	+9.0%	+0.6%	+2.8%	(1.2%)	+5.1%	(3.2%)	+6.2%	(3.9%)	+7.7%	+40.9%
2022	+2.4%	(1.7%)	+3.8%	(2%)	+4.4%	(11.1%)	+6.7%	(3.3%)	(9.7%)	+7.1%	+12.0%	(4.1%)	+1.8%
2023	+7.2%	+2.2%	(5.3%)	+4.3%									+8.3%

Hypothetical Performance



SUMMARY STATISTICS

Strategy began	2020-08-03
Suggested Minimum Capital ⓘ	\$60,000
# Trades	19
# Profitable	17
% Profitable	89.5%
Correlation S&P500	0.383
Sharpe Ratio	0.93
Sortino Ratio	1.38
Beta	0.54
Alpha	0.07
Leverage	2.05 Average 5.42 Maximum

European Stock Exposure

(131920147)

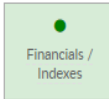
EUROPEAN STOCK EXPOSURE

Started: 10/2020 | Futures | Last trade: Yesterday | Promote

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Trading Category: **Futures**



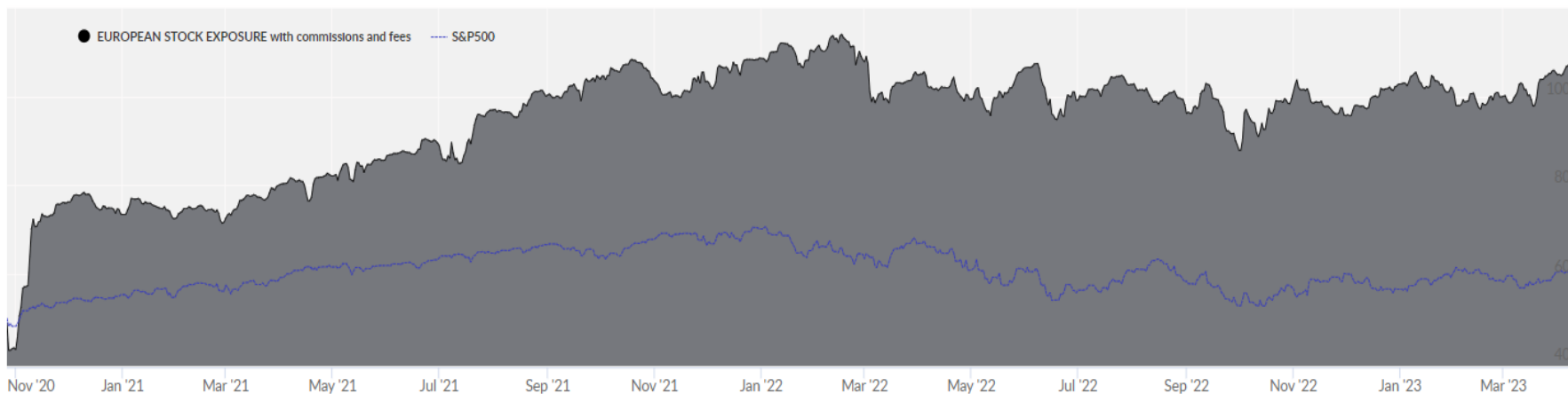
Change this

36.1% Annual Return (Compounded)	(23.2%) Max Drawdown	328 Num Trades	73.2% Win Trades	1.6 : 1 Profit Factor	58.1% Win Months
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Hypothetical Monthly Returns (includes system fee and Interactive Brokers commissions and fees)


	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD
2020										(13.5%)	+76.0%	(3.7%)	+46.7%
2021	(1.3%)	(0.8%)	+11.1%	+2.8%	+4.9%	+3.4%	+8.9%	+3.2%	+3.4%	+0.5%	+0.3%	+4.3%	+48.4%
2022	+1.1%	(1.5%)	(3.8%)	(4.7%)	+7.1%	(7.8%)	+4.8%	(5.3%)	(9.8%)	+14.3%	(5.6%)	+8.5%	(5.6%)
2023	(1.8%)	(0.9%)	+4.9%	+1.9%									+4.0%

Hypothetical Performance



SUMMARY STATISTICS

Strategy began	2020-10-27
Suggested Minimum Capital	\$100,000
# Trades	328
# Profitable	240
% Profitable	73.2%
Correlation S&P500	0.268
Sharpe Ratio	1.13
Sortino Ratio	1.89
Beta	0.34
Alpha	0.08
Leverage	Average: 1.76 Maximum: 7.59

The background features a dark blue, semi-transparent overlay over a collection of coins and a banknote. On the left, there are stacks of coins, with some showing the word 'PUTAMINE' and 'LAD'. On the right, a ten-pound banknote is visible, with the word 'TEN' and 'Pounds' clearly legible. A solid yellow rectangle is positioned in the top right corner.

Assisting Investors Just Like You



Monzo Bank

327,203 followers

5d · 🌐

MEETING ROOM OF THE WEEK: The World Record 🏆

In 2016 (wow, time flies) we held a crowdfunding round where we raised £1m in 96 seconds. That was quite the day at the office, believe us. And it just so happened to be the fastest crowdfunding in history (at the time).

To remember that day, we named a room in our office after it. You're allowed to do non-record breaking things in there too, but it's highly discouraged.



Some Further Context

ACCESSWIRE

The Portfolio Platform's Record Breaking Fund Raise



businessmole

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The Portfolio Platform Raises a Record Breaking £1 million in 36s

March 7, 2023 Beth Haven 0 0

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The Portfolio Platform Raises 1m GBP in 36s

07 March 2023, 13:19

Source - LSE Non-Regulatory

RNS Number : 1843S
Portfolio Platform (The)
07 March 2023

The Portfolio Platform's Record Breaking Fund Raise:

It's official- The Portfolio Platform (TPP) is ready for lift off. The next chapter for this fast growing business is upon us. The 2.5 year old disruptive fintech operation has just closed their first fundraising round, in record time.

3 Options Today



WEBSITE



FREE DEMO



FREE
CONSULTATION