

# Discretionary Investment Managers

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Transact provides access to over 120 Discretionary Investment Managers (DIMs) through our platform, and we are always happy to consider onboarding new discretionary firms if it benefits your business. This document provides details of the DIMs that are available, plus a high-level view of the portfolio options available.

If your chosen DIM is not listed, please speak to your Transact Business Development Manager for more information on how we can support your chosen partner.

*Transact is not affiliated with the DIMs and other third parties listed in this document. These details are provided for information purposes only and are not intended to be a recommendation for any third-party service. Any links to websites (other than those owned by Transact) are provided for information purposes only. No responsibility is accepted for their content or their availability.*

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7IM	8AM Global Ltd
Aberdeen	AJ Bell
Albemarle Street Partners	Albert E Sharp
Alpha Beta Partners	Alpha Portfolio Management
Amati Global Investors Ltd	Arbuthnot Latham
Aspen Advisers	Asset Intelligence Portfolio Management
Aubrey Capital Management	Barmac Asset Management
Barras Capital Management Limited	Beaufort Investment Management Limited

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Binary Capital	Blackfinch Investments Limited
Bordier UK	BRI Wealth Management
Brooks Macdonald Asset Management	Canaccord Genuity Wealth Management
Cantab Asset Management	Cardale Asset Management Ltd
Castlefield Investment Partners LLP	Cave & Sons Ltd
Charteris Treasury Portfolio Managers	City Asset Management
Close Asset Management Limited	Crossing Point Investment Management Limited
Dowgate Wealth	Drumnor Investments
EBI Portfolios Ltd	EFG Haris Allday
Epworth Investment Management Ltd	EQ Investors Ltd
Evelyn Partners Investment Management Services Ltd	FE Investments Ltd
Frank Investments	Fundamental Asset Management Limited
Fundhouse Bespoke Limited	Fusion Asset Management LLP
Gallium Fund Solutions Limited	GDIM
GHC Capital Market Limited	Hanson Asset Management
Harbour Capital Management	Hawksmoor Investment Management Limited
Helm Godfrey Partners Ltd	Hilbert Investment Solutions
HSBC Global Asset Management	IBOSS Asset Management
Investec Wealth & Investment Ltd	IPS Capital LLP
IronMarket	JM Finn & Co
King & Shaxson Capital Limited	LGT Wealth Management
Liontrust Investment Partners LLP	London and Capital Asset Management
Longley Asset Management	M&G Wealth Investments LLP
MAIA Asset Management	Margetts Fund Management Ltd
Marlborough Investment Management Ltd	MitonOptimal UK Limited
Mole Valley Asset Management	Momentum Global Investment Management
Monogram Capital LLP	Morningstar
Moyes Investments	Netwealth
Newscape Capital Group Ltd	Oberon Investment Limited
OCM Wealth Management	Omba Advisory & Investments Ltd

P1 Investment Management Ltd	Pacific Asset Management
Peregrine & Black Investment Management	Pilling & Co Stockbrokers
PortfolioMetrix	Premier Miton
Psigma Investment Management	Puma Investments
Quartet Investment Managers	Quilter Cheviot Limited
Ravenscroft	RBC Brewin Dolphin Limited
Rivers Capital Management	Rockhold
Rowan Dartington	RSMR Portfolio Services
Saltus Asset Management	Sanlam
Sarasin & Partners	Schroder Investment Solutions
SCM Direct	SG Kleinwort Hambros Bank Limited
Sorbus Partners	Sparrows Capital
Stellar Asset Management	T.Bailey Asset Management
TAM Asset Management	Tatton Investment Management
Thornbridge Investment Management	Tier One Capital Ltd
TIME Investments	Timeline
TindleWealth	Titan Asset Management
Tribe Impact Capital	Twenty20 Capital LLP
Tyndall Investment Management	Unbiased Financial Group LLP
Vanguard	Voyager Asset Management
Walker Crips	Waverton Investment Management
Whitechurch Securities Ltd	Whitman Asset Management
WM Capital Management Ltd	



**M386 Version (1) June 2026**

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