

February Summary 2026

Figures as of 28/02/2026

This information is for professional financial advisers only.

622,000

True Potential
Investments
Platform clients

Five Star

Defaqto
Rated*

£39 billion

Invested on
the True Potential
Investments Platform

£34 billion

Invested in
True Potential
Portfolios



Based on over

20,200

reviews

Award Winning

19 industry awards and ratings in 2025:



**Best Use of Technology in the Investment
Life & Pensions Sector**

True Potential Investments

Investment Life and Pensions Moneyfacts
Awards 2025



Best Platform Service

True Potential Investments

Schroders UK Platform Awards 2025



Wealth Management Company of the Year

True Potential Wealth Management

Wealth & Asset Management Awards 2025



Best Client Engagement Provider

True Potential Investments

Professional Adviser Awards 2025



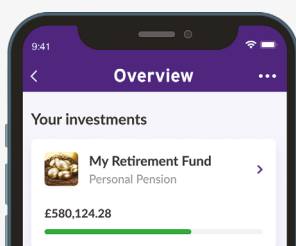
Best Industry Initiative

True Potential Adviser Services

City of London Wealth Management
Awards 2025

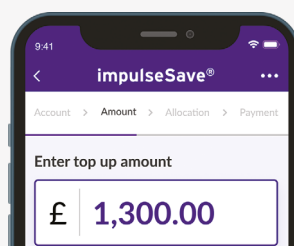
*True Potential Investments are five star Defaqto rated in the following areas: Consumer Platform, Adviser Platform, Drawdown and Personal Pension

Our Technology



Track

- Track how your investments are performing in real time
- 24/7 access
- Quickly and easily check your investments



Top up

- Invest as little as £1 at a time with impulseSave®
- Stay on track to reach your goal by setting an impulseSave® reminder



Engage

- Receive alerts about your account and investments
- Watch our latest videos about markets and investing
- Receive content personalised to your preferences

With investing, your client's capital is at risk. Investments can fluctuate and you may get back less than you invest. Past performance is not a reliable indicator of future performance.

True Potential Portfolios

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Annualised performance since launch 01/10/2015 - as of 28/02/2026



Defensive



Cautious



Cautious +



Cautious Income



Balanced



Balanced +



Balanced Income



Growth



Growth +



Aggressive

As of 28/02/2026	Feb 21 - Feb 22	Feb 22 - Feb 23	Feb 23 - Feb 24	Feb 24 -Feb 25	Feb 25 - Feb 26
Defensive	+1.6%	-4.2%	+3.8%	+6.4%	+9.7%
Cautious	+2.7%	-3.6%	+5.0%	+8.2%	+14.0%
Cautious +	+3.6%	-4.1%	+6.3%	+8.7%	+13.4%
Cautious Income	+6.9%	-3.5%	+4.4%	+11.9%	+14.1%
Balanced	+4.6%	-3.5%	+6.9%	+9.5%	+ 15.9%
Balanced +	+5.6%	-3.3%	+7.5%	+9.9%	+ 15.0%
Balanced Income	+7.4%	-3.4%	+5.2%	+12.2%	+14.5%
Growth	+6.6%	-1.8%	+8.2%	+10.5%	+17.1%
Growth +	+7.5%	-2.4%	+9.3%	+11.5%	+17.7%
Aggressive	+9.3%	-0.8%	+9.2%	+12.0%	+19.4%

Net of Ongoing Charges Figure. All figures as of 28/02/2026. Source: True Potential Investments.

11 million

Client logins
in the last
12 months

276 million

invested with
impulseSave® in
the last 12 months

Download the
True Potential app



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