

FOR INVESTMENT PROFESSIONALS ONLY

## SUMMARY OF KEY DIFFERENCES

	AIM IHT GROWTH PORTFOLIO	AIM IHT INCOME PORTFOLIO
<b>FOCUS</b>	Capital Growth	Balance Growth/Income
<b>AVERAGE DIVIDEND YIELD</b>	1.8%	5.5%
<b>AVERAGE MARKET CAP COMPANIES</b>	£565m	£269m
<b>NO OF STOCKS IN PORTFOLIO</b>	20-32 subject to size	30 fixed
<b>MIN PORTFOLIO SIZE</b>	£20k on platform	£40k (suggested)
<b>INCOME DISTRIBUTION</b>	No	Yes
<b>AVAILABLE ON WRAP PLATFORM</b>	Yes	Yes

### AIM IHT Growth Portfolio - company example



**CVS Group PLC (AIM:CVSG)** is one of the largest integrated veterinary services provider in the UK, owning over 500 veterinary practices across its three markets (UK, Netherlands and Republic of Ireland), including eight specialist referral hospitals and 37 dedicated out-of-hours sites. Alongside the core Veterinary Practices division, CVS also operates Laboratories, Crematoria and an online retail business.

CVS, one of AIM's largest companies valued at over £1.4 billion (December 2022), has delivered consistently strong growth in revenues and profits over a number of years, which is anticipated to continue. Its forecast dividend yield (Dec 2022) is only 0.41%

### IMPORTANT INFORMATION

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## AIM IHT Income Portfolio – company example



**Gateley Holdings (AIM:GTY)** was the first commercial law firm in the UK to list on AIM in 2015 and is currently valued at £215m (December 2022). Since listing, Gateley has acquired a dozen complementary consultancy businesses which have broadened and diversified their offering, creating four distinct platforms: Business Services, Corporate, People and Property.

Growth since listing has been consistent if relatively modest, but Gateley aims to distribute up to 70% of profit after tax to shareholders in the form of dividends. The forecast dividend yield is currently (December 2022) of 5.5%.



### The Importance of IHT Planning



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Growth or Income  
AIM IHT Portfolios

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