

Rank	Rank in 2018	Company	CF30s	Gross sales of retail investments and pensions, July 2018 to June 2019 (£m)	Gross sales of retail investments and pensions, July 2017 to June 2018 (£m)	Net sales of retail investments and pensions, July 2018 to June 2019 (£m)	Net sales of retail investments and pensions, July 2017 to June 2018 (£m)	Assets under management in retail investment funds 2019 (£m)	Assets under management in retail investment funds 2018 (£m)
1	6	Quilter Financial Planning	25 or more	10,000	11,000	2,800	3,900	37,000	31,000
2	37	Close Brothers Asset Management	25 or more	340	260	150	110	570	430
3	26	Grant Thornton Group	25 or more	240	210	140	140	1,100	1,200
4	5	Wilfred T Fry (Personal Fin Plan)	14 to 24	240	230	31	69	810	260
5	3	Mazars Financial Planning Ltd	14 to 24	550	470	150	170	1,100	940
6	N/A	Charles Stanley	25 or more	250	880	70	2	1,100	690
7	N/A	Progeny Wealth Ltd	25 or more	350	92	170	45	800	280
8	20	St James's Place Wealth Management	25 or more	15,000	16,000	9,500	10,000	110,000	97,000
9	1	Tenet	25 or more	1,700	2,100	520	1,200	5,800	4,400
10	41	LEBC Group Ltd	25 or more	560	430	390	340	1,600	860
11	70	Openwork	25 or more	2,700	2,600	810	870	9,800	6,500
12	N/A	Bartlett Wealth Management Ltd	07 to 13	150	94	20	35	230	160
13	N/A	Hazlewoods Financial Planning	0 to 6	150	98	37	40	260	230
14	10	Tavistock Investments	25 or more	540	510	160	270	1,400	870
15	57	Cullen Wealth Ltd	14 to 24	130	190	73	120	800	180
16	55	Punter Southall Group	25 or more	3,600	1,900	430	220	3,100	2,600
17	N/A	Equilibrium Asset Management	07 to 13	450	1,100	68	500	1,100	360
18	N/A	Marsh Commercial	25 or more	1,500	1,100	380	410	2,600	2,700
19	54	Ludlow Wealth Management Group	07 to 13	230	220	110	150	1,100	480
20	18	Westminster Wealth Management LLP	25 or more	280	280	110	160	410	270
21	27	HFCM Wealth	25 or more	230	180	75	50	270	240
22	25	Paradigm Norton Financial Planning Ltd	14 to 24	180	150	63	66	550	180
23	9	Foster Denovo	25 or more	1,500	890	270	260	1,700	1,400
24	73	Smith & Pinching Financial Services Ltd	14 to 24	170	150	18	40	410	110
25	N/A	Premier Benefit Solutions Ltd	14 to 24	160	180	73	120	490	320
26	N/A	Lycetts Financial Services Ltd	07 to 13	130	100	27	67	220	170
27	68	Skipton Group	0 to 6	670	610	350	410	3,600	3,500
28	15	Pi Financial Ltd	25 or more	290	430	73	280	590	440
29	N/A	Barnett Waddingham Group	25 or more	630	280	85	50	280	230
30	32	Perspective Group	25 or more	450	400	97	110	1,300	790
31	N/A	Antrams Financial Services	07 to 13	150	45	80	12	280	210
32	34	Validpath Ltd	25 or more	160	170	60	76	510	370
33	N/A	Brooks Macdonald	25 or more	400	1,500	64	640	560	470
34	2	JLT Group	25 or more	1,100	940	260	310	1,600	1,600
35	45	Chase de Vere	25 or more	1,600	920	360	480	5,300	4,600
36	N/A	Clark Gillone	07 to 13	200	240	96	160	460	380
37	61	Wren Sterling Financial Planning Ltd	25 or more	370	300	110	200	1,100	680
38	28	HSBC Bank Group	25 or more	1,200	1,100	140	330	9,000	5,900
39	4	Kerr Henderson Group	14 to 24	610	310	63	61	750	670
40	12	Beckett Inv Management	14 to 24	280	250	63	100	560	500
41	44	InPartnership	25 or more	900	1,200	240	750	3,000	2,400
42	49	Argyle Consulting Ltd	07 to 13	210	200	73	85	470	410
43	N/A	Ellis Bates	25 or more	180	150	25	36	160	160
44	63	Sense Network Ltd	25 or more	1,000	1,000	220	310	2,600	1,900
45	21	Harwood Wealth Management Group	25 or more	770	1,000	160	430	2,100	1,700
46	80	N W Brown & Co Ltd	14 to 24	280	180	40	64	520	430
47	8	Brewin Dolphin Ltd	25 or more	2,500	3,400	130	800	11,000	11,000
48	65	Advanta Wealth Ltd	14 to 24	270	170	45	76	340	250
49	48	Central Investment Services (Scotland) Ltd	07 to 13	140	230	26	56	580	260
50	38	Smith & Williamson Group	25 or more	800	780	96	210	3,900	3,400
51	N/A	A & J Wealth Management Ltd	07 to 13	220	110	39	44	300	230
52	43	Lloyds Banking Group	25 or more	2,400	4,300	-1,800	340	18,000	21,000
53	31	Joseph R Lamb Independent Financial Advisers Ltd	07 to 13	470	260	37	68	280	260
54	N/A	Broadstone	14 to 24	430	270	61	64	380	370
55	67	Sanlam Financial Services Group	25 or more	800	820	17	190	2,400	1,900
56	51	Tilney Group	25 or more	980	1,900	-290	-480	7,400	8,000
57	90	Skerritt Consultants Ltd	14 to 24	160	240	47	58	350	320
58	N/A	Mattioli Woods Plc	25 or more	500	320	74	18	970	920
59	96	Wills & Trusts IFP Ltd	07 to 13	250	250	47	39	92	77
60	82	Clairville York Ltd	0 to 6	160	120	24	32	220	200
61	64	Barclays Group	25 or more	940	1,200	-120	-290	4,600	4,900
62	42	Lumin Wealth Management Ltd	07 to 13	190	160	44	81	400	270
63	69	HFS Milbourne Financial	14 to 24	180	180	40	41	390	360
64	35	Hoyl Group	25 or more	160	120	34	51	460	390
65	N/A	The Private Office	25 or more	440	180	81	76	1,100	910
66	N/A	Schofield Money Ltd	0 to 6	160	97	45	55	180	150
67	40	UBS Group	25 or more	420	360	-120	-42	1,400	1,500
68	N/A	Keyte Ltd	0 to 6	180	110	61	59	120	90
69	11	Wingate Group	07 to 13	270	150	31	41	340	300
70	N/A	Murdoch Asset Management Ltd	0 to 6	150	78	60	49	130	94
71	62	Pannells Financial Planning Ltd	14 to 24	340	300	41	52	520	460
72	17	Lovewell Blake Group	07 to 13	150	110	19	31	260	240
73	N/A	Timothy James & Partners Ltd	14 to 24	200	190	51	54	610	560
74	22	Ring Associates Ltd	07 to 13	180	160	40	76	350	310
75	17	Lighthouse Group	25 or more	710	1,300	190	930	3,300	2,800
76	N/A	Lifetime Financial Management Intermediaries Ltd	07 to 13	140	72	20	31	25	19
77	66	Attivo Group	14 to 24	160	120	27	42	370	300
78	84	Lomond Financial Management	07 to 13	170	130	30	70	190	160
79	N/A	KBL	0 to 6	480	450	68	130	1,400	1,500
80	N/A	Sacre Associates LLP	07 to 13	250	88	43	44	470	420
81	33	Fairstone Group	25 or more	1,200	1,300	230	540	4,100	3,000
82	24	Canaccord Genuity Group	25 or more	260	430	-240	60	940	1,000
83	N/A	AFWM Ltd	0 to 6	130	71	37	34	120	96
84	N/A	Mutual Financial Management LLP	07 to 13	150	120	42	65	59	54
85	75	Loveday & Partners Ltd	14 to 24	160	200	32	84	480	360
86	74	Hargreaves Lansdown Group	25 or more	6,500	7,300	110	1,300	33,000	33,000
87	39	Best Practice IFA Group Ltd	25 or more	860	770	97	290	2,800	2,200
88	N/A	Reeves Independent	0 to 6	160	62	60	40	60	25
89	N/A	Francis Clark Financial Planning Ltd	14 to 24	200	130	36	58	410	370
90	30	Succession	25 or more	1,400	670	62	220	5,900	1,800
91	N/A	Hugh Davies Associates Ltd	0 to 6	140	66	8	6	82	65
92	N/A	Martin Aitken Financial Services Ltd	0 to 6	160	110	9	9	210	190
93	N/A	Ascot Lloyd	25 or more	840	590	110	130	2,800	2,300
94	N/A	Origen Financial Services Ltd	25 or more	280	240	93	140	1,400	1,300
95	N/A	Furnley House Group	07 to 13	260	170	25	33	100	88
96	N/A	Edison Wealth Management Ltd	0 to 6	170	110	37	-2	120	130
97	85	Investec Group	25 or more	1,800	2,300	67	440	8,200	8,200
98	N/A	Alan Steel (Asset Management) Ltd	07 to 13	220	220	38	39	1,100	1,100
99	N/A	Pinnacle Financial Planning Ltd	14 to 24	250	230	26	54	330	290
100	N/A	The Royal Bank of Scotland Group	0 to 6	910	430	-130	-120	3,900	3,500

Table notes

The list includes only firms whose primary business (i.e. majority of sales) is classified by Matrix Solutions as financial advisers, wealth managers and banks are included. □ Individual firms that are affiliated with a wider group are included within the figures for the wider group and appointed representatives are included within the figures for their principal, regardless of whether they could appear individually.

□ The figures for the list have been rounded up and include assets invested in retail discretionary funds, reported to Matrix Solutions by our Financial Clarity partners, other assets, such as those invested in discretions and portfolios, hedge funds etc. are not included

□ Matrix Solutions receives data directly from fund managers covering 90 per cent of the UK retail investment market into the Financial Clarity product. Fund manager data is further supplemented and enhanced with platform feeds. The top 25 fund managers account for 80 per cent of retail assets under management and Matrix Solutions received sales data from 22 of these investment houses. Sixteen platforms submit data to Matrix Solutions, including 15 at fund and intermediary level. High platform coverage provides visibility of platform sales from fund managers not currently contributing directly to Financial Clarity.

□ CF30 numbers may include qualified staff who are actively advising customers. Certain firms no longer have CF30's registered against them following a change in the regulatory regime in March 2016.

□ Matrix is an ISS Market Intelligence company. □