

CLIENT REPORTING UPDATE – 10% DROP

April 2025

PRIVATE AND CONFIDENTIAL



STONEHAGE
FLEMING

NOW AND FOR FUTURE GENERATIONS

Article 62 was deleted from the UK MiFID Organisational Regulation by [SI 2022 No. 1297](#) and removes obligations for investment firms providing portfolio management services to a retail client to inform the client when the overall value of the portfolio depreciates by 10%.



