

## High-quality investment talent

*Your guide to our Cirilium investment partners*



*Suitable for financial advice professionals only.*

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The Cirilium Passive Portfolios only invest in passive funds, so some of the benefits listed in this brochure are not available for those portfolios.



# Introducing our investment partners

*The ability to access the right asset classes and geographies, at the right time, is central to how multi-asset portfolios generate wealth for your clients.*

To build our globally-diversified Cirilium Portfolios, we partner with some of the most successful investment managers from around the world.

Our investment partners provide us with a wide choice of different investment strategies across a broad range of asset classes, sectors, and geographies. Spanning the world from San Francisco to Singapore – they offer access to a wealth of insight and expertise.



**BlackRock**

**Federated  
Hermes**



**J.P.Morgan**  
ASSET MANAGEMENT

**Janus Henderson**  
INVESTORS

**LIONTRUST**

**M&G**  
Investments

**Ninety  
One**

**PREMIER  
M&TON**  
INVESTORS

 **redwheel**

**WELLINGTON  
MANAGEMENT**



## A focus on tailored manager research

*Our research and selection process ensures our investment partners are all high-quality asset managers that have a strong competitive edge in their respective asset class or market.*

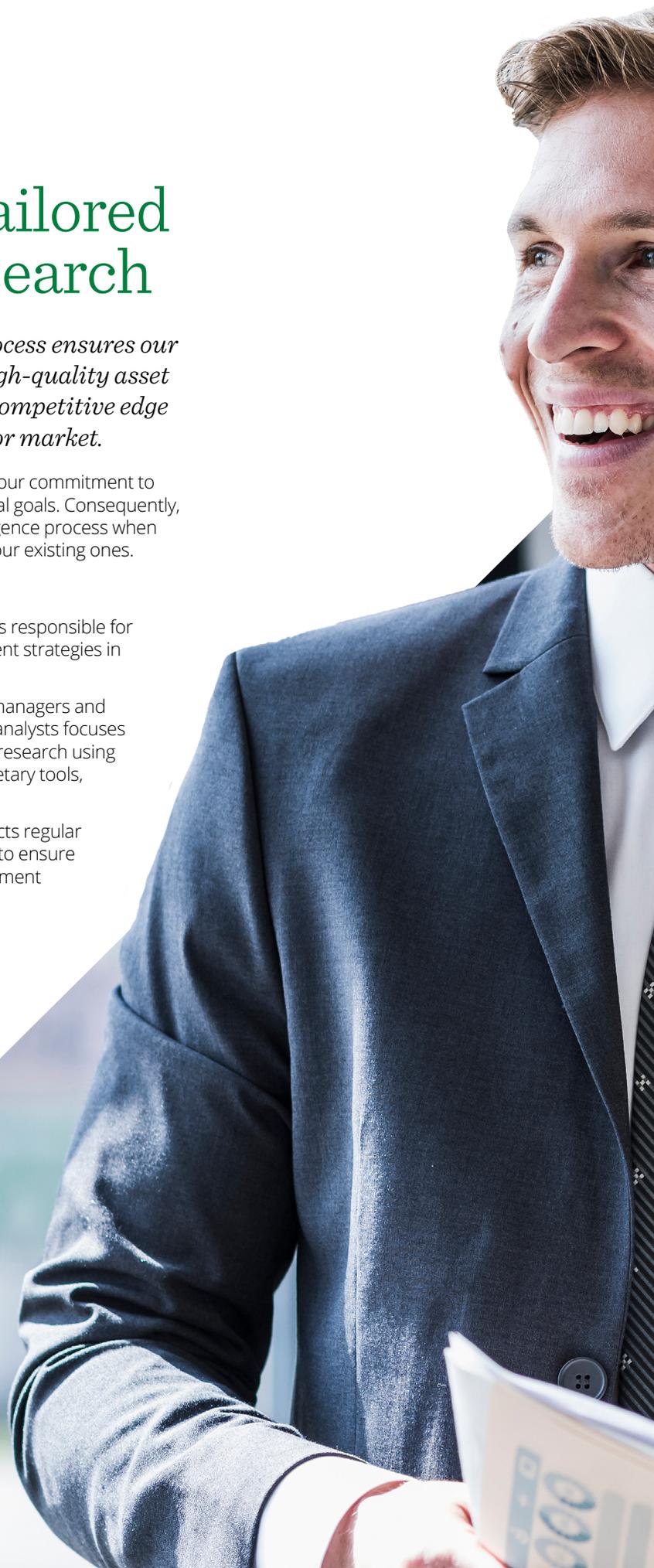
Our investment partners must all share our commitment to helping your clients achieve their financial goals. Consequently, we use a rigorous research and due diligence process when selecting new partners and monitoring our existing ones.

### *Staying ahead of the curve*

Our dedicated manager research team is responsible for identifying and researching the investment strategies in which the Cirilium Portfolios invest.

When validating and assessing current managers and screening for new ones, the team of six analysts focuses on in-depth quantitative and qualitative research using a range of analytical applications, proprietary tools, and technical models.

The manager research team also conducts regular meetings with all our existing managers to ensure the initial rationale for holding the investment still stands.





## Under the microscope

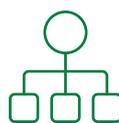
*Our operational due diligence team aims to identify and mitigate operational risk before and after investment. A key focus is to prevent financial losses that could stem from operational failure.*

After the manager research team has identified a potential strategy, a full research programme is undertaken including a demonstration of the asset manager’s financial sustainability and operational strength alongside its investment expertise, resources, and relevant capabilities.

The assessment completed by our operational due diligence team aims to determine the suitability of the investment managers identified by our manager research team.

The in-depth analysis is broken down into several component parts, including:

Organisational structure



Human resources



Operations and technology



Compliance and audit



Reputation



Fund structure





# An investment solution you can trust

*The Cirilium Portfolios offer you a multi-asset investment solution built and managed with the needs and preferences of your clients at its core.*

## You can trust our risk-targeted portfolios for three key reasons:



### *Portfolios designed with you and your clients in mind*

The Cirilium Portfolios give your clients a risk-targeted investment solution designed to meet their financial goals from day one. We'll work with you to carefully match your clients' goals, risk appetite, and price preference to a suitable portfolio.

**The Cirilium Portfolios give you the choice you need to meet the needs of your clients and help them achieve their financial goals.**



### *Expert portfolio management*

When you choose the Cirilium Portfolios for your clients, you'll both get the highest standards of investment management. We use our expertise, experience, and the investment analysis of our dedicated research team to build portfolios designed to deliver long-term growth.

**By assessing a wide range of investment options, you and your clients can be confident that we are utilising the most appropriate toolkit to drive investment returns while managing risk.**



### *World-class investment partners*

We partner with some of the most successful investment managers from around the world. We select expert partners who can demonstrate a competitive edge in the asset classes, regions, and investment styles.

**This means you and your clients can have the confidence that their investments are being managed by a team of leading experts.**



# Your next step

*We look forward to showing you how our Cirilium Portfolios can meet the needs of you and your clients.*

## It's easy to get in touch

1.  *Simply open your phone camera and scan this QR code.*


2.  *Choose an investment director.*


3.  *Call their direct number or email them.*

# Thank you for considering our Cirilium Portfolios for your clients.

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## *Important information*

**Investment involves risk. The value of investments may go down as well as up and investors may not get back the amount originally invested.**

There are also other risks shown below of which investors should be aware. For more information on these risks, investors should read the key investor information document(s) (KIID(s)).

The portfolios are denominated in one currency, but may hold assets denominated in other currencies, which means exchange rate changes may cause the value of investments to rise or fall. The portfolios may invest in a range of assets such as bonds, equities (company shares), and other investment funds. This means the portfolios will be subject to the collective risks of those investments and, in the case of other investment funds, the collective risks of those investment funds as well as their underlying investments. The portfolios deduct the charges from the capital of the portfolios, which means there is the potential for capital erosion if insufficient capital growth achieved to cover the charges. The portfolios may use derivatives, which means there may be a higher level of risk. The portfolios may invest more than 15% in cash, which could reduce returns in rising markets and reduce losses in falling markets. The portfolios may hold investments that may be more difficult to sell, which may affect the ability of investors to withdraw their money. The portfolios invest in emerging markets, which may be more volatile than investments in developed markets.

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