

Quilter

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 give us access to a wide range of 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

LIONTRUST
COURAGE · POWER · PRIDE



**PREMIER
MITON**
INVESTORS



Schroders

**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.

Keeping pace with changing markets

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 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

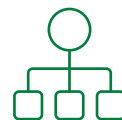
Our operational due diligence team aims to identify and mitigate operational risk before and after investment. A key focus is to prevent financial losses that could stem from operational failure.

After the manager research team has identified a potential strategy, a full research programme is undertaken. This includes 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 and your clients a multi-asset investment solution built and managed with their needs and preferences 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 will work with you to carefully match your clients' goals, risk appetite, and price preference to a suitable portfolio.



Expert portfolio management

When you choose the Cirilium Portfolios for your clients, you will 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.



World-class investment partners

We partner with some of the most successful investment managers from around the world. We select expert partners who demonstrate a competitive edge in their specific asset class.

Your next step

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

Contact your Quilter investment director:



1. *Open the camera app on your phone.*
2. *Scan the QR code.*
3. *Tap to open the website.*
4. *Call their direct number.*

The Cirilium Portfolios have evolved to offer you and your clients a wide range of choice across two vital portfolio elements: investment style and risk.

Marcus Brookes
Chief Investment Officer



Thank you for considering our Cirilium Portfolios for your clients.

Important information

quilter.com

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Registered office at Senator House, 85 Queen Victoria Street, London, EC4V 4AB.

Quilter Investment Platform Limited is authorised and regulated by the Financial Conduct Authority under reference number 165359.

The Quilter Investors Cirilium Conservative Portfolio, Quilter Investors Cirilium Balanced Portfolio, Quilter Investors Cirilium Moderate Portfolio, Quilter Investors Cirilium Dynamic Portfolio, Quilter Investors Cirilium Adventurous Portfolio, Quilter Investors Cirilium Conservative Blend Portfolio, Quilter Investors Cirilium Balanced Blend Portfolio, Quilter Investors Cirilium Moderate Blend Portfolio, Quilter Investors Cirilium Dynamic Blend Portfolio, Quilter Investors Cirilium Adventurous Blend Portfolio, Quilter Investors Cirilium Conservative Passive Portfolio, Quilter Investors Cirilium Balanced Passive Portfolio, Quilter Investors Cirilium Moderate Passive Portfolio, Quilter Investors Cirilium Dynamic Passive Portfolio, and Quilter Investors Cirilium Adventurous Passive Portfolio are sub-funds of Quilter Investors Cirilium OEIC, an investment company with variable capital incorporated in England and Wales. Quilter Investors Cirilium OEIC is authorised by the Financial Conduct Authority as a non-UCITS retail scheme and can be distributed to the public in the United Kingdom.

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