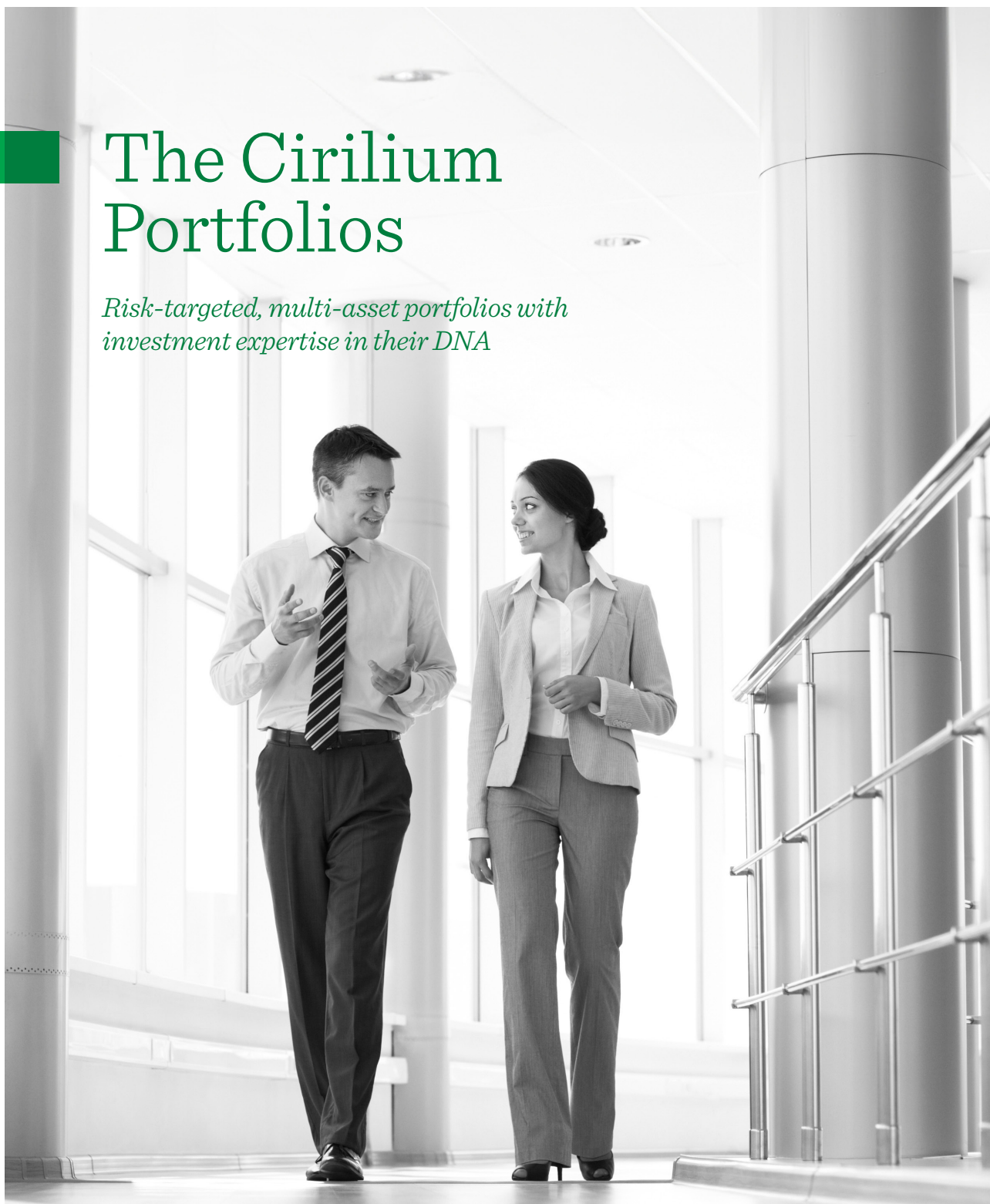


# The Cirilium Portfolios

*Risk-targeted, multi-asset portfolios with  
investment expertise in their DNA*



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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.

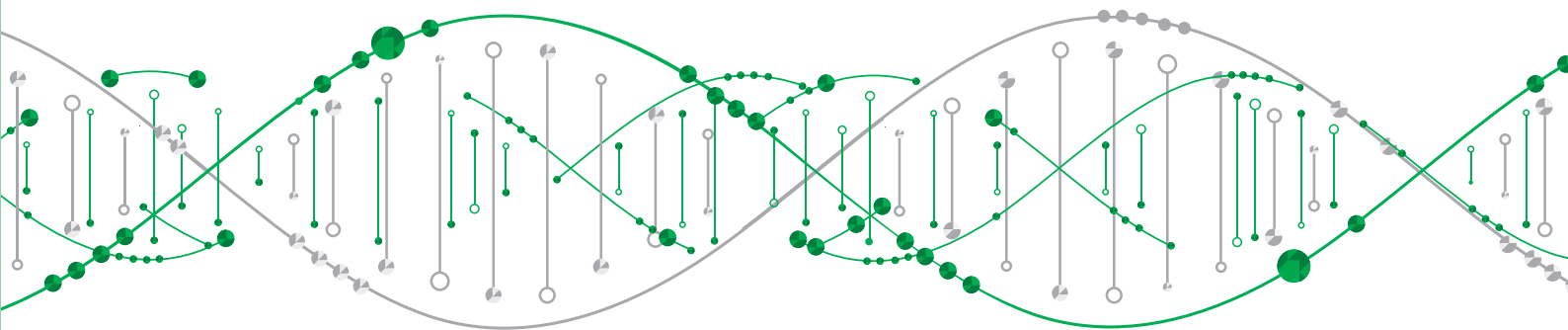


# Introducing our investment partners

*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 manager 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.





## 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 our 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.*

Managed by our expert portfolio managers, using the most appropriate investment toolkit, they deliver an investment solution that can help your clients achieve their financial goals.

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



### *Expert portfolio management*

When you choose the Cirilium Portfolios for your clients, you'll both get the highest standards of investment management.

**This means you and your clients can have the confidence that their investments are in safe hands.**

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### *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.**

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### *An investment toolkit centred on best-in-class research*

Our team of research experts analyse the market daily. They work closely with the portfolio managers to unearth the best possible opportunities in traditional asset classes, alternatives, and investment trusts.

**By assessing a wide range of investment options, you and your clients can be confident that we can enhance investment returns while managing risk.**

# 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

## *Important information*

**Investment involves risk. The value of investments and the income from them may go down as well as up and investors may not get back the amount originally invested. Because of this, an investor is not certain to make a profit on an investment and may lose money. Exchange rate changes may cause the value of overseas investments to rise or fall.**

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