

Suitable for professional clients.

Introducing our research hub

In 2023, we formed our research hub bringing together a wealth of investment talent to optimise our internal processes and create a market-leading investment research team. As our Chief Investment Officer, Marcus Brookes, explains, this investment is already bearing fruit for you and your clients.

The research hub provides us with improved oversight and enhanced control throughout our investment process. By implementing a fully integrated, systematic, and collaborative approach to our research process, we can evidence the discipline and rigour that accompanies every investment we make on behalf of your clients.

The research hub brings together three distinct investment disciplines to provide a consistent, transparent approach to our investment research. These are:

1 *Manager research*

2 *Responsible investment*

3 *Operational due diligence*

Scouring the globe

Our expanded manager research capabilities are headed up by Kristian Cassar. Kristian is an experienced investor who joined us from Deutsche Bank, where he led the private bank's fixed-income fund selection team. Prior to this he was a fund manager, which means he boasts a wealth of experience in both manager research and portfolio construction.

The manager research team is responsible for the sourcing and selection of the funds held in our portfolios. The team, consisting of six investment analysts, uses quantitative analysis to evaluate performance through an examination of style factors, holdings, positioning, and performance attribution. In addition, the team holds meetings with prospective managers to qualitatively assess their organisational set-up, the team involved in the management of the fund, and to understand each manager's investment philosophy and investment process (including the integration of ESG factors). Once a manager has been selected, the manager research team will closely monitor the chosen fund on an ongoing basis.

As Kristian explains: "We conduct in-depth, proprietary research, which is split by asset class and region. This allows for greater depth of knowledge within sectors, which helps us to identify best-of-breed managers.

"We have a collaborative team culture and work side-by-side with our portfolio managers to capture the benefit of their experience with certain strategies and managers. This collaboration ensures that time spent on generating new ideas is focused on areas where there's the greatest benefit."



*Kristian Cassar,
Head of Manager Research*



"By implementing a fully integrated, systematic, and collaborative approach to our research process, we can evidence the discipline and rigour that accompanies every investment we make on behalf of your clients."

Marcus Brookes, Chief Investment Officer

Responsible approach

Marisol Hernandez heads up our responsible investment team. Marisol is a specialist in responsible investment and ESG-led investing, who brought 15 years of industry experience to the team when she joined from the UN-backed PRI (Principles for Responsible Investment) initiative. She now leads a team of five experts in the development and implementation of our responsible investment and ESG research and engagement.

As Marisol explains, "Responsible investment is a discipline. Part of my role is to ensure that we incorporate relevant ESG research into every part of our underlying investment processes. Our goal is to ensure that Quilter Investors leads the way in removing a lot of the confusion that arises from responsible investment."

Our responsible investment integration framework is embedded throughout our other research processes. The creation of the research hub, along with its systems and processes, facilitates collaboration. This means we can assess a manager's capability of supporting ESG integration and stewardship at the same time as we review its investment processes and manager credentials. This approach delivers a distinct advantage and is reflected in the positive outcomes for your clients.



Marisol Hernandez,
Head of Responsible
Investment

Looking under the bonnet

Our operational due diligence team is led by Given Chanetsa-Mazarura. Given joined us from Mercer, where he was a principal in its investment operational risk consulting team. Given's team assesses the ability of fund managers to manage your clients' money in a safe and compliant manner that adheres to all aspects of the investment mandate we have provided.

This requires in-depth analysis, which is broken down into the following areas:



Organisational
structure



Reputational
risks



Operations
and technology



Compliance
and audit



Human
resources



Fund
structure



Given Chanetsa-Mazarura,
Head of Operational
Due Diligence

As Given explains, "My team works alongside the manager research analysts. While they're focused on finding the managers who can perform, our job is to conduct 'health checks' on the operational soundness of the managers they're targeting and on those managers with which we're already invested.

"For us, promising investment performance is only the start of the process. We conduct an end-to-end investigation of every manager. This spans everything from their governance, operational processes and audit practices to their investment management and trading platforms, to ensure that your clients' money is never exposed to undue risk."

A meeting of minds

By combining three separate investment disciplines in the research hub we have created far more collaboration and connectivity, making us better able to respond to events with well-informed, swift decision making.

We're delighted with the enhancements that the research hub has brought to our investment processes, especially at a time of such rapid growth in our core business. The teams it combines have made exceptional progress in achieving traction within our business with output from the research hub now underpinning every aspect of our investment activities.

Building out our capabilities with proven professionals from a range of investment disciplines in this way ensures that we're ready for the next stage of our evolution as a business and that we continue to deliver robust and transparent solutions for you and your clients in the years to come.



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 any of 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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