

# Quilter

## A wealth of expertise and insight

*Your guide to our WealthSelect global partners*



*Suitable for professional clients only.*

# Overview

*WealthSelect harnesses the power of a select group of high-quality asset managers and brings them together in one place helping to deliver an expertly designed investment solution that you and your clients can trust.*

Our WealthSelect global partners offer a wide choice of different investment strategies across a broad range of asset classes, sectors, and geographies.

We understand that no one can be an expert at everything all the time, so our research and selection process is focused on ensuring our WealthSelect global partners are all high-quality asset managers that have a strong competitive edge in their respective asset class or market.



### *A wealth of expertise*

Our WealthSelect global partners span the world from San Francisco to Singapore. They offer access to a wealth of insight and expertise – all of which we've brought together to make life easier for you and your clients.

The breadth of our WealthSelect global partners investment offering is evidenced by the number of potential investment choices available. In aggregate, they provide access to more than 4,000 different strategies – many of which aren't available to retail investors.

For example, JP Morgan Asset Management offers hundreds of different investment strategies including the JPM US Growth Advantage strategy. This isn't available anywhere else in the UK retail market, but it is the strategy behind our US Equity Growth sub-advised mandate.

### *Choosing the best*

Our WealthSelect global 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. Potential candidates are screened against the quality of their investment propositions; their distinctiveness and reach; their level of brand awareness; their commercial standing; and their ability to manage sub-advised mandates.

Just as importantly, all of our WealthSelect global partners must be stable and robust investment businesses. If we can't be sure that a manager will be 'here tomorrow', then we won't consider entrusting your clients' money with them today.

*Our WealthSelect global partners must all share our commitment to helping your clients achieve their financial goals.*



### *Research and analysis*

Our dedicated manager research team is responsible for identifying and researching the strategies from our WealthSelect global partners.

When validating and assessing current managers and screening for new ones, the team of six analysts focus 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 of our existing managers to ensure the initial rationale for holding the investment still stands.

### *Operational due diligence*

After the manager research team have identified a potential strategy, operational due diligence is undertaken to assess the asset manager's financial stability and operational resilience including their investment and operational processes, systems, and resources.

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

The operational due diligence team aim to identify and mitigate operational risk before and after investment.

This in-depth analysis is broken down into a number of component parts, including:

- Organisational structure and governance
- Reputation
- Responsible investment
- Operations and technology
- Compliance and audit
- Human resources
- Fund structure

### *Sub-advised mandates*

Where appropriate, we ask our WealthSelect global partners to manage the selected investment strategy as a sub-advised mandate. This approach can offer many benefits and advantages to you and your clients.

#### **Enhanced control**

The investment adviser typically runs the sub-advised mandate in a similar way to their main retail fund. However, the sub-advised mandate allows us to refine the investment strategy to reflect a desired customer objective. For example, we can choose where the fund invests, its exposure to unlisted stocks, or where it sits on the market-cap spectrum.

#### **Greater transparency**

Sub-advised mandates offer us real-time access to the underlying holdings, providing sight of every individual trade and deal placed. We can easily understand any risks and ensure the investment adviser is running the strategy in the way we would expect.

This enhanced visibility also allows better insight for our portfolio managers and enhanced reporting for your clients.

#### **Increased flexibility**

We select each investment adviser with a long-term view, but the flexibility provided by a sub-advised mandate can be very beneficial to you and your clients.

If we want to change an investment adviser, the flexibility of the sub-advised mandate means this can be managed far more efficiently than a standard switch from one fund to another.



### *Oversight and monitoring*

Our WealthSelect global partners and the sub-advised mandates are subject to a number of layers of oversight and governance to give you and your clients added confidence.

### **Regulatory responsibility**

Quilter Investors Limited is the Authorised Corporate Director (ACD) for all of the Quilter Investors sub-advised funds managed by our WealthSelect global partners. They ensure the investment advisers are suitable individuals and capable of delivering the objectives of the funds.

### **Strong governance**

We also have a robust and consistent governance framework that provides independent oversight of the investment advisers' investment selection, best execution, liquidity management, and

asset valuation activity.

Our governance structure also provides the opportunity to review and challenge proposals for changes to investment advisers, assess performance of the sub advisers' relative to expectations, and ensure the investment advisers remain appropriate to provide robust investment solutions offering good outcomes for your clients.



# A wealth of expertise

*Our WealthSelect global partners are home to some of the world's best known fund managers. Many of the sub-advised mandates will be run in a similar way to their existing retail strategies, but with added governance, oversight, flexibility, and transparency.*

## *Sub-advised mandates and their investment advisers*



*Quilter Investors Europe  
(ex UK) Equity Growth*

Thorsten Winkelmann, Marcus Morris-Eyton, Darina Valkova, Robert Hofmann, and Nicolas Goncalves



*Quilter Investors Emerging  
Markets Equity Income*

Alison Shimada



*Quilter Investors UK Equity  
Large-Cap Income*

Adrian Frost, Nick Shenton, and Andy Marsh

*Quilter Investors UK Equity  
Opportunities*

Andy Gray and Henry Flockhart



*Quilter Investors Precious  
Metals Equity*

Evyn Hambro and Tom Holl

*Quilter Investors UK Equity  
Growth*

Roland Arnold



*Quilter Investors US Equity  
Income*

John Bailer, Brian Ferguson, and Keith Howell Jr.



*Quilter Investors Asia Pacific  
(ex-Japan) Equity*

Anthony Srom

*Quilter Investors Sterling  
Corporate Bond*

Kristian Atkinson and Shamil Gohil

*Quilter Investors Sterling  
Diversified Bond*

Tim Foster



*Quilter Investors Asia Pacific  
(ex Jap) Large-Cap Equity*

William Lam

*Quilter Investors Investment  
Grade Corporate Bond*

Michael Matthews and Tom Hemmant

## J.P.Morgan

ASSET MANAGEMENT

*Quilter Investors Emerging Markets Equity Growth*

Leon Eidelman

*Quilter Investors US Equity Growth*

Felise Agranoff

## Janus Henderson

INVESTORS

*Quilter Investors Absolute Return Bond*

Daniel Siluk and Addison Maier

*Quilter Investors China Equity*

Victoria Mio

*Quilter Investors Europe (ex UK) Equity*

Tom O'Hara and Tom Lemaigre

*Quilter Investors Natural Resources Equity*

Daniel Sullivan and Darko Kuzmanovic

## JUPITER

*Quilter Investors Asia Pacific*

Amadeo Alentorn

*Quilter Investors Emerging Markets Equity*

Nick Payne

*Quilter Investors Global Equity Absolute Return*

Amadeo Alentorn

*Quilter Investors North American Equity*

Amadeo Alentorn

*Quilter Investors UK Equity*

Errol Francis

*Quilter Investors UK Equity Income*

Ed Meier

## M&G

Investments

*Quilter Investors Japanese Equity*

Carl Vine

## PICTET

*Quilter Investors Timber Equity*

Christoph Butz and Mikael Jafs

## Premier Miton

INVESTORS

*Quilter Investors Corporate Bond*

Lloyd Harris and Simon Prior

*Quilter Investors Diversified Bond*

Lloyd Harris and Simon Prior

## redwheel

*Quilter Investors Global Equity Value*

Nick Clay and Andrew MacKirdy

## Schroders

*Quilter Investors Europe (ex UK) Equity Income*

Andrew Evans and Andrew Lyddon

*Quilter Investors US Equity Small/Mid-Cap*

Bob Kaynor

## TwentyFour

a boutique of Vontobel

*Quilter Investors Dynamic Bond*

Eoin Walsh, Felipe Villarroel, and David Norris

### *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 rates may cause the value of overseas investments to rise or fall.*

*[www.quilter.com](http://www.quilter.com)*

*Please be aware that calls and electronic communications may be recorded for monitoring, regulatory and training purposes and records are available for at least five years.*

*The WealthSelect Managed Portfolio Service is provided by Quilter Investment Platform Limited and Quilter Life & Pensions Limited. "Quilter" is the trading name of Quilter Investment Platform Limited (which also provides an Individual Savings Account (ISA), Junior ISA (JISA) and Collective Investment Account (CIA)) and Quilter Life & Pensions Limited (which also provides a Collective Retirement Account (CRA) and Collective Investment Bonds (CIB)).*

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*This communication provides information relating to the Quilter Investors Absolute Return Bond Fund, Quilter Investors Asia Pacific (ex Japan) Equity Fund, Quilter Investors Asia Pacific (ex Japan) Large-Cap Equity Fund, Quilter Investors China Equity Fund, Quilter Investors Corporate Bond Fund, Quilter Investors Diversified Bond Fund, Quilter Investors Dynamic Bond Fund, Quilter Investors Emerging Markets Equity Fund, Quilter Investors Emerging*

*Markets Equity Growth Fund, Quilter Investors Emerging Markets Equity Income Fund, Quilter Investors Europe (ex UK) Equity Fund, Quilter Investors Europe (ex UK) Equity Growth Fund, Quilter Investors Europe (ex UK) Equity Income Fund, Quilter Investors Global Equity Absolute Return Fund, Quilter Investors Global Equity Value Fund, Quilter Investors Investment Grade Corporate Bond Fund, Quilter Investors Japanese Equity Fund, Quilter Investors Natural Resources Equity Fund, Quilter Investors Precious Metals Equity Fund, Quilter Investors Sterling Corporate Bond Fund, Quilter Investors Sterling Diversified Bond Fund, Quilter Investors Timber Equity Fund, Quilter Investors US Equity Growth Fund, Quilter Investors US Equity Income Fund, and Quilter Investors US Equity Small/Mid-Cap Fund, which are sub-funds of Quilter Investors OEIC, and the Quilter Investors Asia Pacific Fund, Quilter Investors North American Equity Fund, Quilter Investors UK Equity Fund, Quilter Investors UK Equity Growth Fund, Quilter Investors UK Equity Income Fund, and Quilter Investors UK Equity Large-Cap Income Fund, Quilter Investors UK Equity Opportunities Fund, which are sub-funds of Quilter Investors Trust. Quilter Investors OEIC and Quilter Investors Trust are authorised and regulated by the Financial Conduct Authority as UCITS Schemes. An investors should read the Key Investor Information Document(s) ("KIID") before investing in any sub-fund of Quilter Investors OEIC or Quilter Investors Trust. The KIID and the prospectus can be obtained from [www.quilter.com](http://www.quilter.com) in English. Quilter Investors Limited ("Quilter Investors"), Senator House, 85 Queen Victoria Street, London, England, EC4V 4AB. Quilter Investors is registered in England and Wales (number: 04227837) and is authorised and regulated by the Financial Conduct Authority (FRN: 208543).*

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