



PORTFOLIOMETRIX

INVESTMENT MANAGEMENT **BY** DESIGN

INTRODUCTION TO PORTFOLIOMETRIX

PortfolioMetrix provides Investment Management by Design.

We are a high-energy, results-driven global investment management business with offices in London, Dublin, Johannesburg and Cape Town. We support and empower our adviser partners to provide truly bespoke and scaleable investment solutions to their clients with our integrated technology platform and award-winning investment management capability as the cornerstones.

We launched our solution in 2010 to offer relationships and needs-based client solutions with a strong tech underpin. As an investment manager, PortfolioMetrix recognised that the professionalisation of advice would lead to greater specialisation and an opportunity for tighter integration between advisers and investment managers like ourselves. With technology as a multiplier of our collective abilities the sky is the limit.

Preferring a narrow "partner" model, PortfolioMetrix has delivered scalable, global-first portfolio customisation to top advisers.

These pioneering efforts have been recognised through multiple industry awards, including those for innovation, investment performance and process, disruption, client service and adviser satisfaction.

AWARD WINNING PERFORMANCE

We are regularly recognised by the industry and our peers for our performance and our innovation.



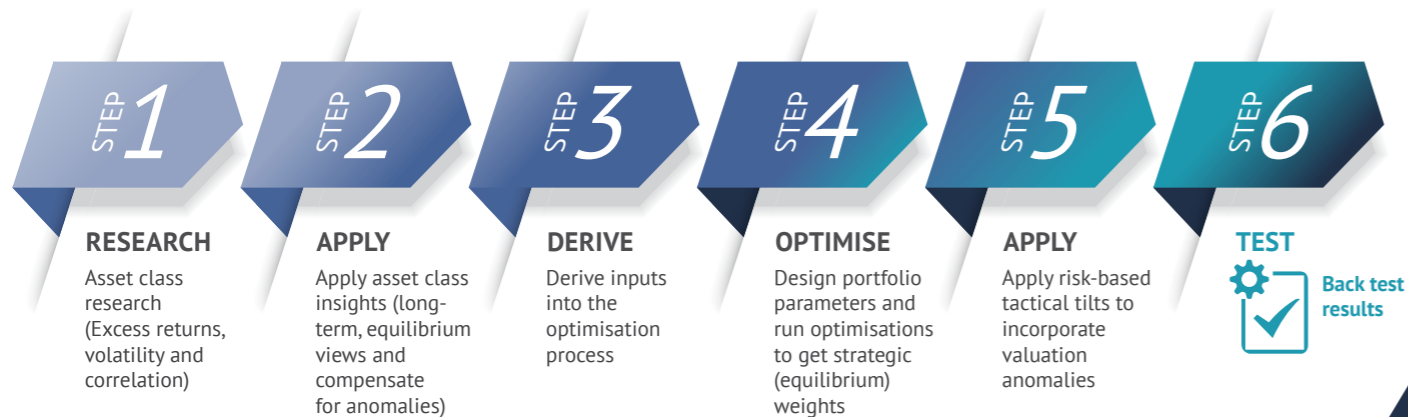
INVESTMENT PHILOSOPHY

We believe dogma is dangerous and prefer the intelligent application of sound theory.

Crystal ball gazing is fruitless, and conviction needs to be consistent with the ability to forecast events. We believe that well-engineered asset allocation, meticulous diversification, tight risk controls and a pragmatic approach to manager selection yield better results over time than relying on market-timing and "big calls". Our investment results over time have borne out this view.

OUR PROCESS

Our portfolio construction process is disciplined, rigorous and based on sound investment and behavioural economic theory.



WHAT'S IN IT FOR OUR PARTNERS?

Putting your clients at the centre of our decision making process.



Precision

Portfolios that are calibrated exactly to client's risk score (or adviser interpretation) rather than being ascribed into a simple risk bucket.

PMX offers customised investment solutions for every client in a manner that is scalable and repeatable.



Performance

Our process produces a coherent pattern of results that is consistent with the investment mandate and advisers expectations

Risk is a cost to investors that needs to be rewarded by return.



Partnership

Outsourcing the investment part of the job to PMX allows advisers to:

- A Spend more time with their existing clients
- B Bring on new clients
- C Develop a framework to bring more advisers into their firm.
- D Use WealthExplorer™ to automate many routine tasks for advisers. It cuts a huge amount of time out of client reporting and reviews.

INDEPENDENCE & GLOBAL REACH

PortfolioMetrix is fully independent so we can select from any fund available in the market rather than restricting ourselves to one provider.

We are able to choose the best managers across the globe to support our proposition.



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