

# GLOBALSELECT: RESEARCHED FUND RANGE

Selecting the right funds and managers from the wide universe of funds can be a difficult task. Our Researched Fund Range is designed for your clients by a team of investment experts from Quilter Investors, the multi-asset business of Quilter plc, bringing together the expertise of leading global fund managers.

## Key benefits of our Researched Fund Range



### What we offer:

A simplified approach to selecting and monitoring world-class asset management brands and fund solutions.

### What it means for you:

More efficiency, more business, and so more income potential.

### What we offer:

Help you build a diversified investment portfolio, knowing the funds available have been thoroughly researched and are continuously monitored.

### What it means for you:

You can give your clients the comfort that their investments are being looked after.

### What we offer:

Our experts continuously monitor the funds and fund managers.

### What it means for you:

You can be confident that your chosen funds perform as expected and continue to meet our high standards.

### What we offer:

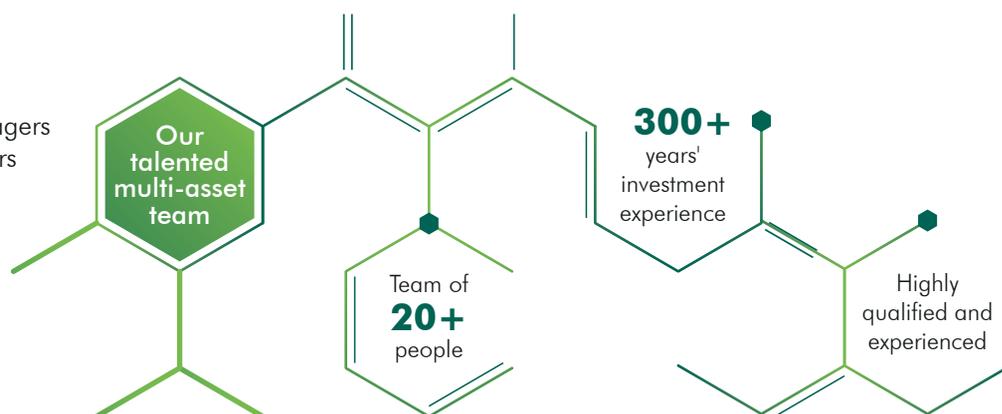
We provide you with research notes for the funds. These notes are updated after each review meeting.

### What it means for you:

Easy access to the evidence as to why you have chosen these funds for your client's portfolio.

## Who we are

Quilter Investors has the experience and knowledge to monitor fund managers and recognise true talent. The numbers speak for themselves.



Turn over to find out more...

**For financial advisers only**

# Selecting for excellence

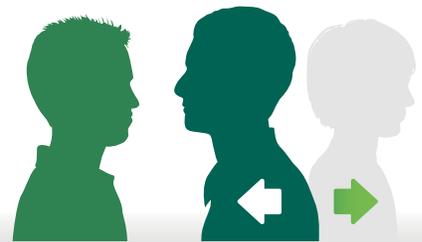
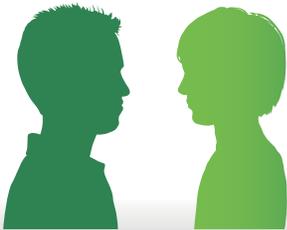
We give you access to the rigorous research process of the multi-asset team to select managers with a strong competitive edge in their respective asset class or market. The team only picks managers who have shown evidence of:

 <b>Success</b> A proven ability to deliver strong and consistent performance.	 <b>Insight</b> A strong understanding of the strength and limitations of their approach.
 <b>Experience</b> Proven skills and success in their approach through a variety of market conditions.	 <b>Commitment</b> The conviction to invest for the long term.



## Importance of a repeatable and robust process

Our research process combining both qualitative and quantitative research, is a continual one in which managers are researched, selected and monitored on an ongoing basis.



### Meeting the managers

Face-to-face meetings with managers are essential to fully understand their investment approach, how they are likely to perform in different market conditions, and to build and retain conviction in their capabilities. We not only meet the fund managers but also all key individuals involved in the investment process to ensure there is a consistent approach.

### In-depth analysis

The team undertakes in-depth quantitative research at all stages of the process to ensure managers perform to expectations and stay true to their stated investment approach. This is done using a selection of analytical tools designed by the team and supported by external systems.

### Replacing managers

Our selected global partners are for the medium- to long-term and we do not anticipate changing them frequently. However, we could consider making a change if we believed this would be in the best interest of investors. Potential reasons for replacement would include:

- organisational change or change of personnel
- change in investment philosophy or process
- drift from our expectations regarding behavior, portfolio positioning or performance
- identification of a better opportunity.

## Experience speaks for itself

Our process and experience of picking funds help increase your chances of success.



Here are some interesting statistics about the research team in 2017:

- It consists of nine analysts with 14 years' average experience.
- Five team members were in Citywire's Wealth Manager Top 100.
- 800 meetings have been attended.

Visit [www.oldmutualinternational.com](http://www.oldmutualinternational.com) to learn more about our investment solutions.

[www.oldmutualinternational.com](http://www.oldmutualinternational.com)

Calls may be monitored and recorded for training purposes and to avoid misunderstandings.

Old Mutual International Isle of Man Limited is registered in the Isle of Man under number 24916C.

Registered and Head Office: King Edward Bay House, King Edward Road, Onchan, Isle of Man, IM99 1NU, British Isles.

Phone: +44 (0)1624 655 555 Fax: +44 (0)1624 611 715. Licensed by the Isle of Man Financial Services Authority.

All promotional material is approved by Old Mutual Wealth Limited. Old Mutual Wealth Limited is authorised and regulated by the Financial Conduct Authority. Financial Services register number 165359.

The rules made under the Financial Services and Markets Act 2000 (as amended) for the protection of retail clients in the UK do not apply.

Old Mutual International Isle of Man Limited is a member of the Association of International Life Offices.

Old Mutual International is registered in the Isle of Man as a business name of Old Mutual International Isle of Man Limited.

Old Mutual International Ireland dac is regulated by the Central Bank of Ireland. Registered No 309649.

Administration Centre for correspondence: King Edward Bay House, King Edward Road, Onchan, Isle of Man, IM99 1NU

Tel: +353(0)1 479 3900 Fax: +353(0)1 475 1020.

Registered and Head Office address: Hambleden House, 19-26 Lower Pembroke Street, Dublin 2, Ireland.

VAT number for Old Mutual International Ireland dac is 6329649S.

Old Mutual International is registered in Ireland as a business name of Old Mutual International Ireland dac.



**OLDMUTUAL**  
INTERNATIONAL