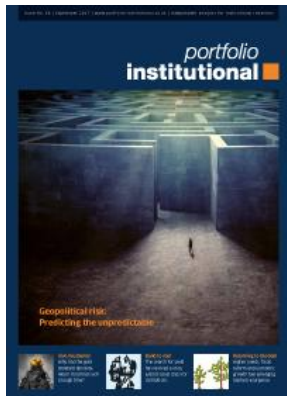


Portfolio Institutional 2018

Portfolio Institutional – our goal is to communicate and inform institutional investors and their consultants about the investment sector. We achieve this by producing investment only long form articles, roundtables and events with a focus on high quality, informative products.

The content is distributed to our audience via a print product and digitally via the site and newsletter



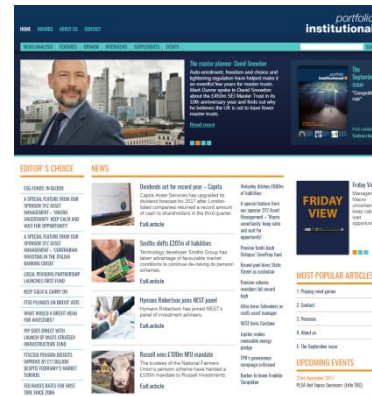
Magazine



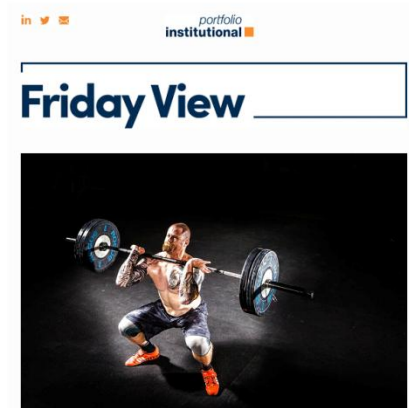
Roundtables



Raising Standards in ESG



Site

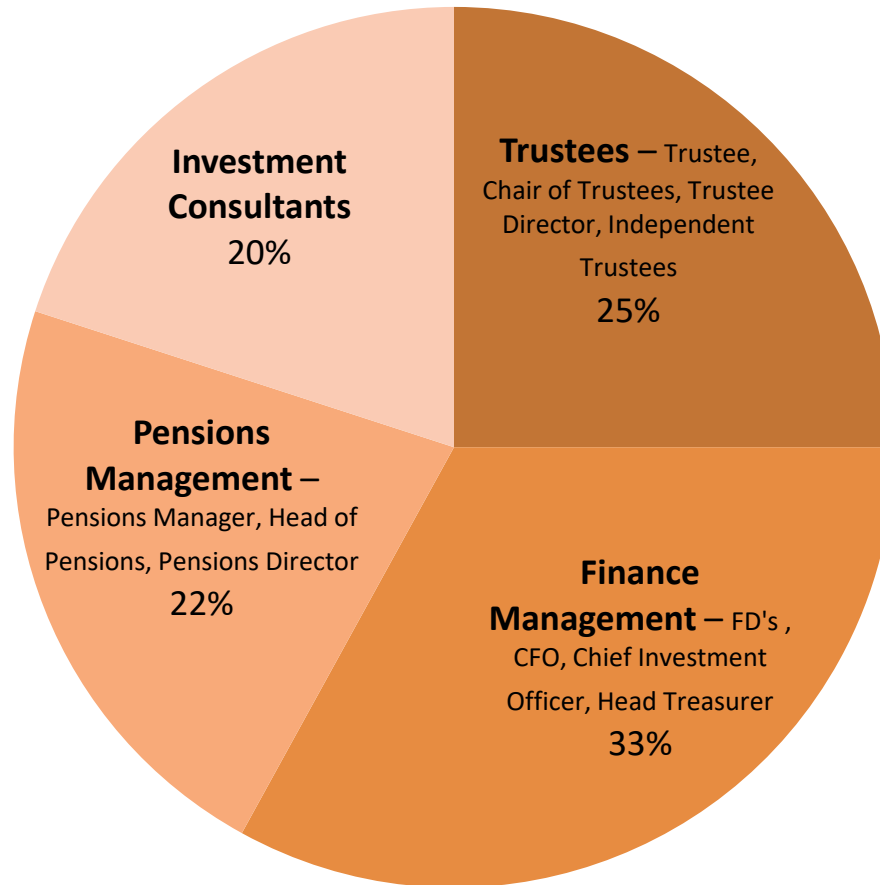


Weekly Newsletter



Target – UK's top 350 DB and DC pensions funds by assets under Management

Print Title 8,000:



Digital:

- All content – roundtables – features are distributed online

- Newsletter = 4,000 opted in subscribers – sent weekly

Site:

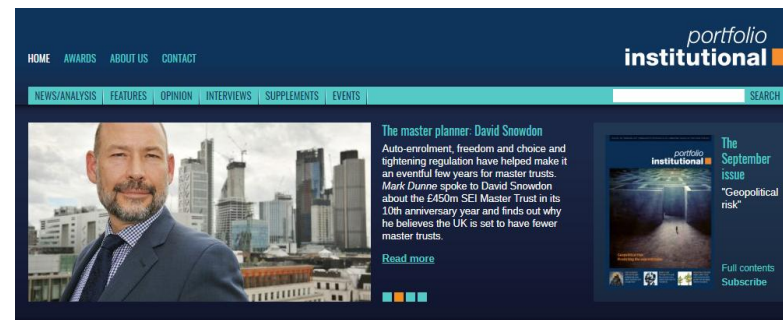
- Monthly Unique Users = 2,700

- Page Impressions = 13,300

- All sponsored content is distributed in print and online.

- Sponsors are sent a post campaign reach report to demonstrate roi.

- Lead generation can also be built into packages



EDITOR'S CHOICE

ESG FUNDS: IN BLOOM

A SPECIAL FEATURE FROM OUR SPONSOR SYZ ASSET MANAGEMENT – "MACRO UNCERTAINTY: KEEP CALM AND WAIT FOR OPPORTUNITY"

A SPECIAL FEATURE FROM OUR SPONSOR SYZ ASSET MANAGEMENT – "CONTRARIAN INVESTING IN THE ITALIAN BANKING CRISIS"

LOCAL PENSIONS PARTNERSHIP LAUNCHES FIRST FUND

KEEP CALM & CARRY ON

FTSE PLUNGES ON BREXIT VOTE

WHAT WOULD A BREXIT MEAN FOR INVESTORS?

PIP GOES DIRECT WITH LAUNCH OF MULTI-STRATEGY INFRASTRUCTURE FUND

FTSE350 PENSION DEFICITS IMPROVE BY £17 BILLION DESPITE FEBRUARY'S MARKET TURMOIL

FED RAISES RATES FOR FIRST TIME SINCE 2006

NEWS



Dividends set for record year – Capita
Capita Asset Services has upgraded its dividend forecast for 2017 after London-listed companies returned a record amount of cash to shareholders in the third quarter.
[Full article](#)



Smiths shifts £207m of liabilities
Technology developer Smiths Group has taken advantage of favourable market conditions to continue de-risking its pension schemes.
[Full article](#)



Hymans Robertson joins NEST panel
Hymans Robertson has joined NEST's panel of investment advisers.
[Full article](#)



Russell wins £100m NFU mandate
The trustees of the National Farmers Union's pension scheme have handed a £100m mandate to Russell Investments.
[Full article](#)

Wiseley ditches £600m of liabilities
A special feature from our sponsor SYZ Asset Management – "Macro uncertainty: keep calm and wait for opportunity"

Pension funds back Octopus' ComProp fund
Brunel pool hires State Street as custodian

Pension scheme members hit record high
Atlas hires Schroders as multi-asset manager
NEST hires Cardano

Jupiter makes renewable energy pledge
TPP's governance campaign criticised
Barber to leave Franklin Templeton



MOST POPULAR ARTICLES

1. Playing mind games
2. Contact
3. Pensions
4. About us
5. The September issue

UPCOMING EVENTS

22nd November 2017
PLSA Hot Topics Seminars: (title TBC)

2018 Full Schedule

December/January 2017/18

Raising Standards in ESG
Investment topics – Emerging Markets
Round Table - Cashflow Aware Investing

February 2018

Raising Standards in ESG – Survey
Investment topics – Infrastructure - DC Investment - Risk Reduction - Emerging Markets
Round table – Multi Asset or Liability Driven Investments
Event – An evening with Portfolio

March 2018

Raising Standards in ESG
Investment topics - Passive vs. Active - Factor Based Investing - Multi Asset - Alternatives
Round table – ESG or Insurance
Event – Breakfast Briefing

April 2018

Raising Standards in ESG
Investment topics – Property - Asset Services - Alternative Credit - Emerging Markets - Fixed Income
Round table - Defined Benefit Strategies or Portfolio Structure
Event – An evening with Portfolio

May 2018

Raising Standards in ESG
Investment topics - Liquid Alternatives – De-risking - Real Return - Emerging Market Debt
Round table – Responsible Investing or Deficit Management
Event – Breakfast Briefing

June 2018

Raising Standards in ESG

Investment topics - Smart Beta - Insurance - Income - Defined Benefit Strategies - Portfolio Structure

Round table - Risk Reduction or Diversified Growth Funds

Event – An evening with Portfolio

September 2018

Raising Standards in ESG

Investment topics - Asset Allocation - Diversified Growth Funds - Bulk Annuities – Deficit Management

Round table - Impact Investing or Factor Based Investing

Event – Breakfast Briefing

October 2018

Raising Standards in ESG

Investment topics - Buyouts and Buy-in - Fiduciary Management - High Yield - Emerging Debt

Round table – Property or Infrastructure

Event – An evening with Portfolio

November 2018

Raising Standards in ESG

Investment topics - Emerging Equities - Global Trading - Impact Investing - Customised Investing

Round table – Multi Asset or Alternative Credit

Event – Breakfast Briefing

December/January 2018/19

Raising Standards in ESG

Investment topics - Liquid Alternatives - De-risking - Real Return - Emerging Market Debt

Round table - Liability Driven Investments or Fixed Income

Event – An evening with Portfolio

Raising Standards in ESG – the new monthly campaign from Portfolio Institutional:

Goal:

To increase awareness, understanding and knowledge with institutional investors, about the benefits, options and the asset managers who offer ESG solutions to pension funds.

Enabling Asset Mangers to communicate their ESG strategies and solutions to pension funds and schemes to learn which options resonate with them.

Solution:

- Portfolio Intuitional write a feature on an ESG topic every month, for example the October issue is 'Gender diversity in investment'. Our features team contact pension funds, consultants, and our sponsors for quotes, comments and research.
- All the features and additional content from our sponsors will be used to create our online ESG Hub that will serve as an ESG library for pension funds

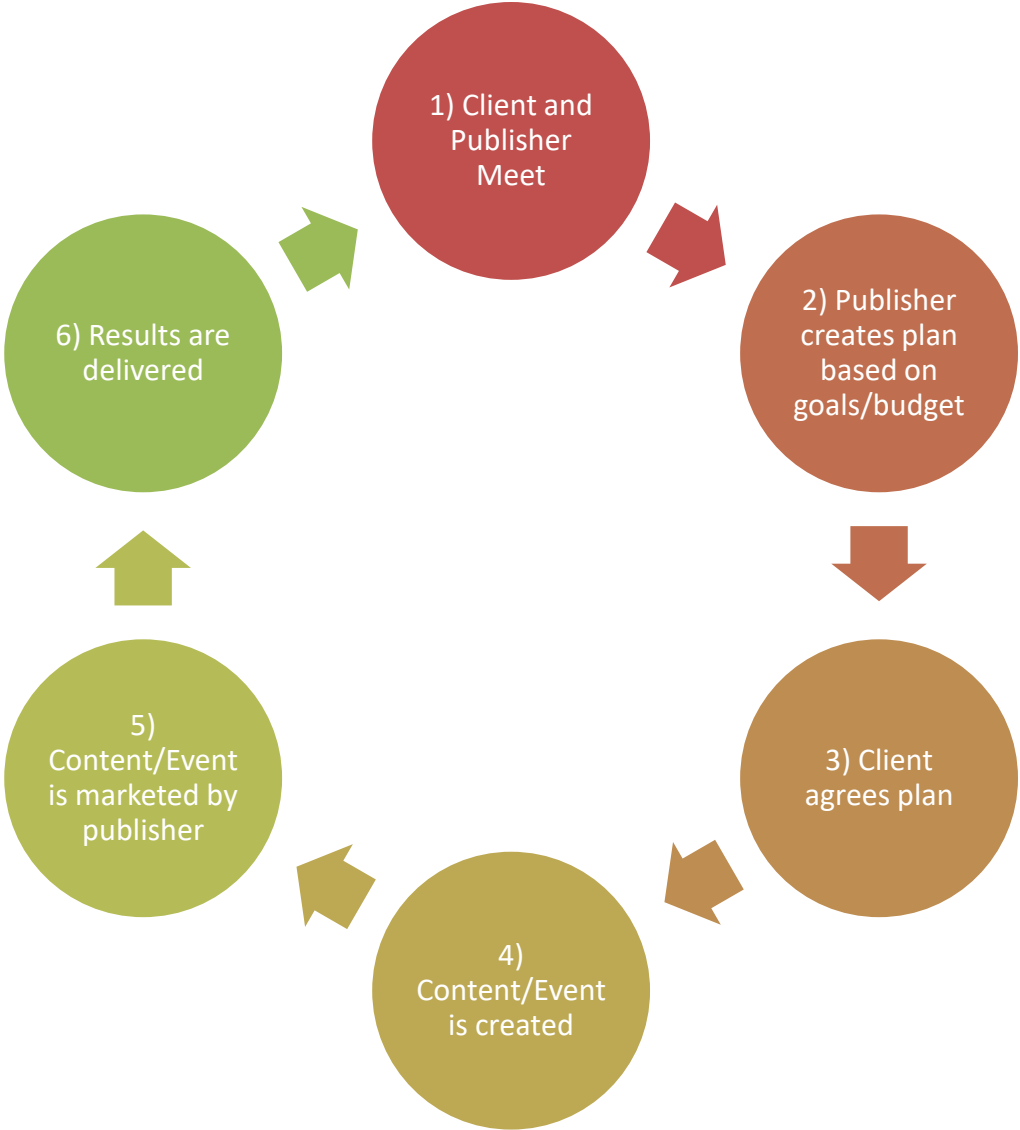
Sponsor package:

- Sponsors will be quoted in every ESG feature in every issue
- We will conducting our first ESG Survey in Q1 2018 sponsors will be sent the a) the full results as they will be used for the feature and b) only sponsors will see the results of the ESG brand survey
- A quarterly call with sponsors to discuss the topics for the features for the following quarter – to ensure we discuss the topics most relevant to you
- Sponsors can send digital assets that will be used to build our ESG Hub

Cost

To be a sponsor for twelve months the total cost is £28,800

Bespoke Packages and Sponsored Content – across print, online and in person



Bespoke Events and Sponsored Content – Examples

These can all be tailored to fit your specific marketing/sales goals

Reach

PENSIONS



A special feature from our sponsor SVZ Asset Management –
'Macro uncertainty: keep calm and wait for opportunity'

Friday 6th October 2017

MACRO UNCERTAINTY: KEEP CALM AND WAIT FOR OPPORTUNITY

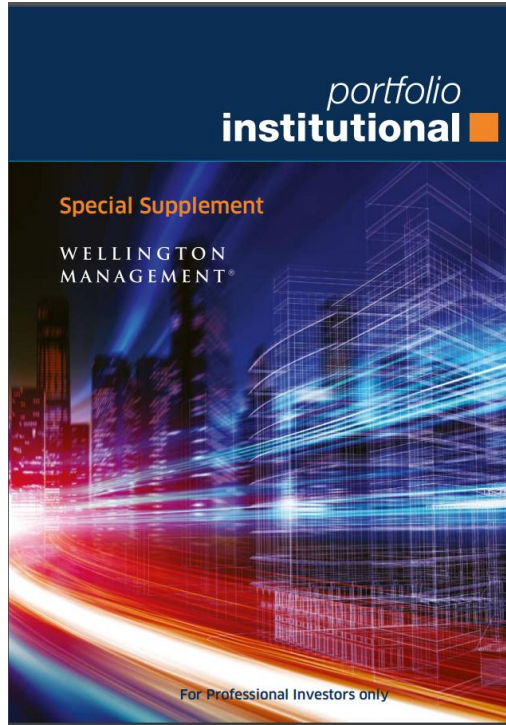
By Mike Clements, head of European equities at SVZ Asset Management

It is difficult to make predictions it was once said, particularly about the future. Last year, I failed to foresee Brexit and the unstoppable ascent of Donald J. Trump to the White House... This year I didn't expect a snap election in the UK and when it was called I wouldn't have imagined that the Conservative party would emerge from it in a worse position. It is lucky that making calls on political outcomes is not part of my investment process.

We are currently undergoing a macro-economic and geo-political maelstrom on both sides of the Atlantic, and it is difficult to know how the markets will react to impending elections and economic flashpoints. This is naturally unnerving for investors, but, fortunately, it is possible to separate politics from portfolio decision making. Indeed, despite failing to predict or factor in any of the big political events of last year, our European equity portfolio managed to be a positive performer.

Using the site for demonstrable reach

Leads



Content Partnership for lead Generation

Meet



Bespoke events created to connect your team to pension funds

portfolio
institutional

Options for 2018

Option a) Work from plan

- Raising Standards in ESG – full sponsorship – £28.8k
- Investment topics – page advertising or sponsored features - £5.8k
- Roundtables – to be one of three sponsors - £12k
- Events – evening or breakfast on topics of your choice - £15k to £10k

Portfolio offer volume discounts and value added for multiple bookings

b) Fully bespoke

- Your goals
- Your budget
- Your outcome

- Our Print title
- Our Digital audience
- Our Events
- Our partners (for example research)

We work in partnership to create = Awareness – Interest – Desire – Action

Branding options, content distribution, lead generation, research all tailored for your specific budgets and goals.

Thank you

For more information please contact:

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