



MEDIA KIT 2017

portfolio institutional is a monthly magazine for institutional investors offering independent comment and analysis, with a strong editorial focus on portfolio construction and asset allocation.

With 8,000 distributed print magazine copies each month, over 5,000 newsletter recipients each week and regular events and discussions over the year, *portfolio institutional* reaches investment decision-makers including:

- Pension funds & trustees
- Local authorities
- Corporate treasurers
- Family offices/Wealth managers
- Charities/Foundation/Trusts
- Investment consultants
- Asset managers







THE PUBLISHER



From our offices in London and Frankfurt, portfolio Verlag delivers commentary, analysis, and networking for our expanding community of professional investors. We focus on the requirements of professional portfolio management, and maintaining our deep market knowledge and wealth of contacts in both the UK and Germany, painstakingly built up over more than 20 years.

At the core of our product range lie our print magazines for institutional investors, wealth managers, fund selectors and retail distributors. Our range of major investment events and conferences is headlined by our flagship event, the institutional investor awards gala evenings held annually in the UK and Germany. Additional events range from investor breakfasts to all-day conferences for fund selectors and wealth managers.

OVERVIEW OF OUR PRODUCT PALETTE

Brand	Readership	Market	Channel
	Institutional Investors	UK	Print Online Events
	Institutional Investors	Germany	Print Online Events
	Wealth managers Family offices Private banks	Germany	Print Online Events
	Fund Advisors Insurance Advisors Fund Selectors	Germany	Print Online

OVERVIEW

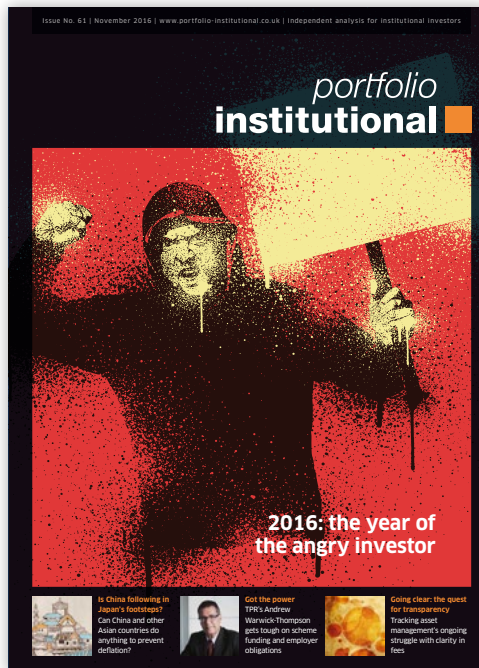
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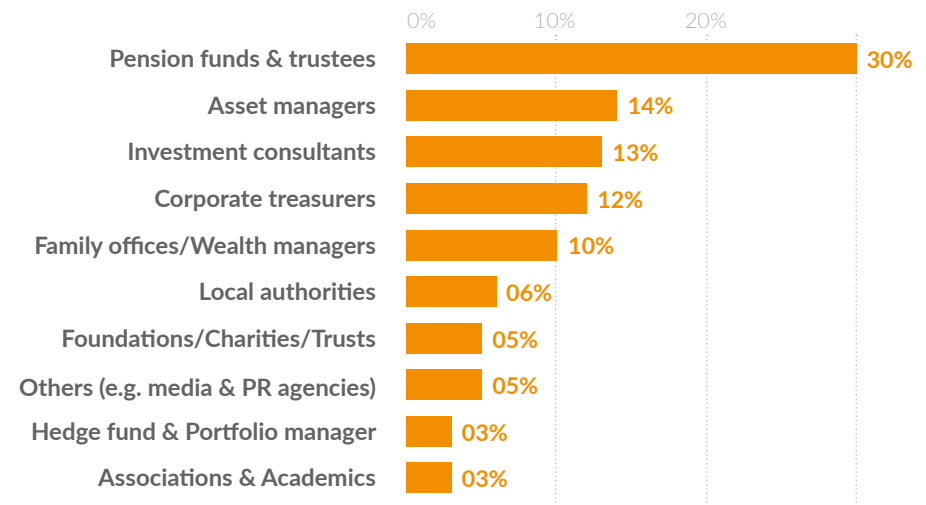
OVERVIEW

portfolio institutional is a monthly magazine for institutional investors offering independent analysis with a strong editorial focus on portfolio construction and asset allocation.

MAGAZINE RECIPIENTS

8,000

READERSHIP BREAKDOWN



"It's always a pleasure to work with such a professional and well organised team, the Portfolio Institutional roundtables are always an important consideration for our financial clients when planning UK campaigns"

Peter Wright, Media Director, Farrar Media

"Sidra and her team provide a quality service for Ptarmigan Media and our clients. Aided by first rate sector knowledge, they are in tune with advertiser needs and go the extra mile to deliver."

Mark Byrne, Ptarmigan Media

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DPS

Price: £9,500

Bleed Size: 420 x 297

Type area size: –

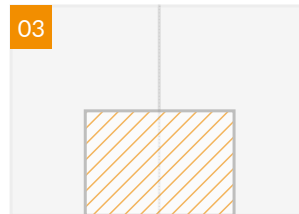


Full page

Price: £5,800

Bleed Size: 210 x 297

Type area size: 188 x 255

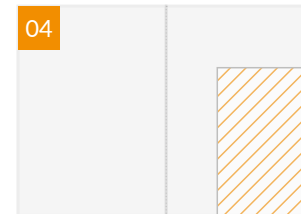


Tunnel ad

Price: £4,200

Bleed Size: 130 x 128

Type area size: –

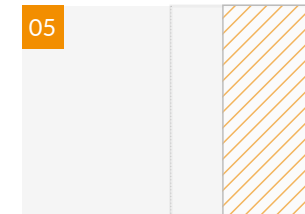


Junior page

Price: £3,800

Bleed Size: –

Type area size: 120 x 175

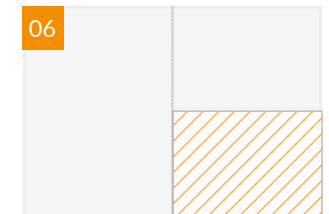


2/3 page portrait

Price: £4,800

Bleed Size: 126 x 297

Type area size: 122 x 255



1/2 page landscape

Price: £3,500

Bleed Size: 210 x 148.5

Type area size: 188 x 129



1/3 page portrait

Price: £3,000

Bleed Size: 63 x 100

Type area size: 57 x 80

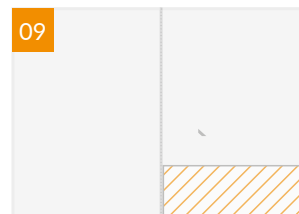


1/3 page landscape

Price: £3,000

Bleed Size: 210 x 297

Type area size: 188 x 255



1/4 page landscape

Price: £2,500

Bleed Size: 210 x 75

Type area size: 188 x 55

COVER PAGE SURCHARGE

Outside back:	£ 1,500
Inside front:	£ 1,000
Inside back:	£ 700

FREQUENCY DISCOUNTS

2 or more insertions:	5%
5 or more insertions:	10%
8 or more insertions:	15%
10 insertions:	20%

OTHER DISCOUNTS

Combo bookings:	5%
Media package bookings:	10%
Agency commission:	15%

REQUEST MAGAZINE

To request back issues and/or a subscription to the magazine please contact london@portfolio-verlag.com

FORWARD FEATURES

In order to receive the feature topics in advance please contact london@portfolio-verlag.com

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SCHEDULE

Issue	Editorial feature	Publication date	Booking deadline	Copy deadline
64 Feb	Liquidity/Cash	08 Feb	12 Jan	17 Jan
65 March	Partnerships/Co-investing	07 Mar	09 Feb	14 Feb
66 April	Fiduciary management	13 Apr	16 Mar	21 Mar
67 May	Smart beta	05 May	12 Apr	19 Apr
68 June	DC default funds	09 June	11 May	16 May
69 July/Aug	Governance/SRI	07 July	08 June	13 June
70 Sep	Absolute return	08 Sep	17 Aug	22 Aug
71 October	Infrastructure	12 Oct	14 Sep	19 Sep
72 Nov	Liability driven investments	15 Nov	12 Oct	17 Oct
73 Dec/Jan	Emerging markets	07 Dec	09 Nov	14 Nov



ADVERTORIAL/THOUGHT LEADERSHIP PIECE

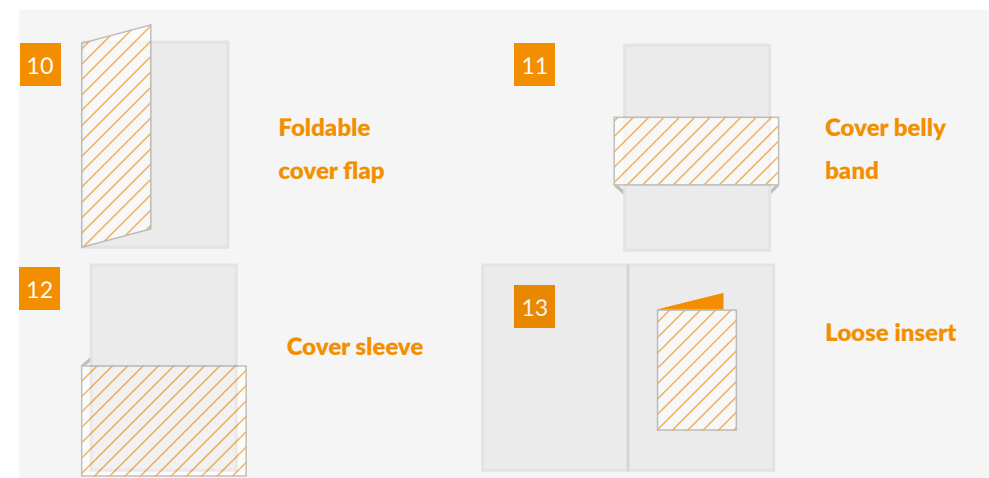
Send us your material and we will run your advertorial in the magazine. This is a format for providers to present their experts and their view.

This includes:

- Your expert's photo and title
- Text body (590 words)
- Headline
- Image/Graph
- Stand first
- Company logo

Rate incl. layout: £6,000

SPECIAL FORMATS



Pricing and sizes on request



WEBSITE

The website offers the best of *portfolio institutional* magazine to our digital audience promoting features, investor interviews, and digital editions of current and past roundtable supplements. In addition, the website delivers the most important news and updates from the institutional investment community, such as mandate wins, governance watch and appointments. The website stands out as a fresh and uncluttered institutional investment website and offers our readers engaging and relevant content.

FORMAT

RATE/CPM

SIZE IN PIXEL

01. Wallpaper	£80	976 x 110 + 200 x 600
02. Sticky skyscraper	£85	200 x 600
03. Leaderboard	£70	976 x 110
04. Half page	£70	300 x 600
05. Skyscraper	£65	200 x 600
06. Stop content banner	£60	515 x 180
07. Small Box	£50	220 x 183

DISCOUNTS

15% agency commission.

PAGE IMPRESSIONS

10,000

AVERAGE PAGE VIEWS PER VISIT

6,45 pages

AVERAGE VISIT DURATION

2,51 min

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FRIDAY VIEW: 27 May 2016 portfolio institutional

The great fiduciary management debate - the case for the defence
By Rory Murphy, Merchant Navy Officers Pension Fund
Fiduciary management mandates have typically been attractive options for smaller pension funds, but have been growing in favour with larger funds. It is a philosophy that polarises opinion but the £2.7 billion Merchant Navy Officers Pension Fund (MNOFP) regards fiduciary management as a keystone of its governance model.

Thoughts on the Tata Steel pension proposal
By Mark Davies, River and Mercantile Group
The evolving situation with the steel industry has interested me greatly; not only because I got married in Port Talbot, but also because the pension scheme is at the forefront of discussion.

How low to go? Exploring low-carbon equity indices
By Aled Jones, Mercer
The risks posed by climate change have become familiar to us all, but investors in particular face the climate challenge with many more questions than answers. In light of the recent Paris climate talks, where a new global agreement to manage carbon emissions and tackle climate change was reached, I'm anticipating that the issue will rise up the agenda for investors in the coming years.

The end of easy money
By Nicolas Forest & Nadège Dubois
The first quarter of 2016 will leave behind the bitter taste of a full-blown hangover. Despite the increased uncertainty of financial markets,

portfolio institutional conference
Governance & responsible investment
13 July 2016

Speakers include:
Deborah Gilman
Edvard Mason
Richard McIndoe
Faith Ward

Sponsored by:
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EASY MONEY

FRIDAY VIEW EMAIL

Friday view is the weekly email for and by the institutional investment community. Published each Friday afternoon, it offers readers a collection of interesting opinions, comments and insights on relevant and current issues by strategists, portfolio manager, consultants, economists and investors.

READERSHIP BREAKDOWN



NEWSLETTER RECIPIENTS

5,000

EXCLUSIVE SKYSCRAPER BANNER

Format
200 x 600 pixel

One issue
£500

Four issues
£1,800

Twelve issues
£4,800

OVERVIEW

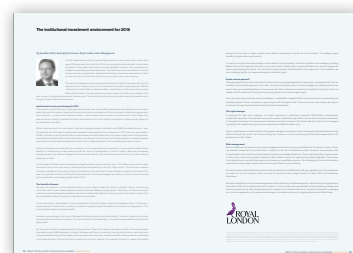
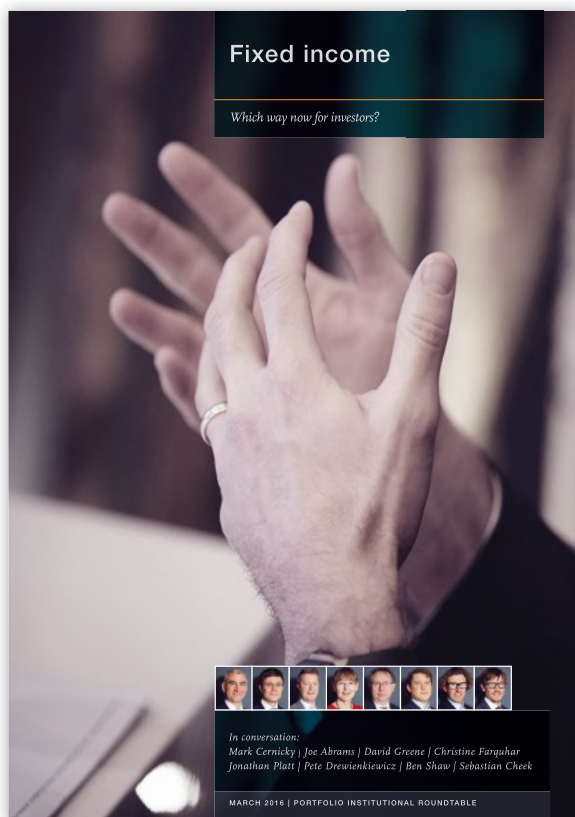
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PORTFOLIO INSTITUTIONAL ROUNDTABLE

portfolio institutional is keen on generating debate and hosts regular roundtable discussions inviting institutional investors and investment consultants to share their expertise and insight on current topics relevant to the institutional investment industry.

The extensive write-up of the discussion is later published as a themed print supplement and is distributed with *portfolio institutional*. Each roundtable discussion/print supplement can be sponsored by up to three asset managers which benefit from a comprehensive sponsorship package.

DC investment

Fiduciary management

Fixed income

Managing volatility

Responsible investment

Emerging markets

Absolute return

Multi asset

Global equities

Alternative investments

ROUNDTABLE DATE

MATERIAL DEADLINE

PUBLICATION DATE

02 December

07.12.

08 February

13 January

08.02.

07 March

09 February

07.03.

13 April

15 March

05.04.

05 May

05 April

03.05.

09 June

10 May

31.05.

07 July

28 June

05.07.

08 September

05 September

07.09.

12 October

13 September

27.09.

15 November

13 October

01.11.

07 December

Topics subject to change

SPONSORSHIP PACKAGE

- Participation in a moderated roundtable discussion
- Publication of a 2 page position paper with company logo
- Full page display advertisement in the supplement
- Distribution with *portfolio institutional* magazine
- Digital version (e-read book) on a dedicated section on portfolio-institutional.co.uk
- PDF file of the supplement with full syndications rights for sponsor's own distribution
- Dedicated email push out to *portfolio institutional* readers
- Up to 500 hard copies of print supplement for sponsors' own distribution

Rate available upon request

POSITION PAPER SPECIFICATION

Supply with the position paper the following:

- Author name, job title & portrait photo
- Title of the position paper
- If graph used, supply the source file in excel format
- Source of image/graph

Position paper to be supplied in word format, mark in the file where the graph/image needs to be placed.

Word limit:

950 words - text only

800 words with one graph/image

ADVERTISEMENT SPECIFICATION

High-resolution pdf-file
in 4 colour (CMYK)

210 x 297 mm
(+3mm trim with markings)

MATERIAL DELIVERY

The material for the 2 page position paper and the display advert in the themed supplement is due on Monday following the roundtable discussion.

We also require your company logo in .jpeg and .eps format as well as the company website link the logo should be linked to.

Send material to:

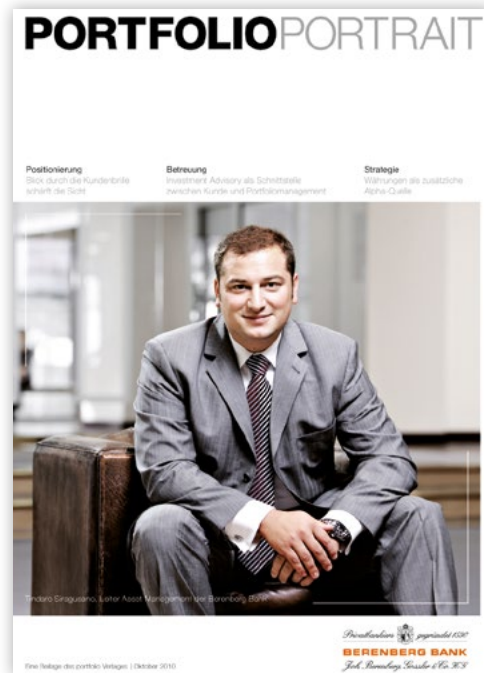
london@portfolio-verlag.com

"I thought the portfolio institutional roundtable discussion was very interesting and quite balanced to cover the views of various groups (asset managers and consultants etc)."

Martin Dietz, fund manager, Legal & General Investment Management

"I have found these roundtable discussions fascinating and the format a much better learning experience than traditional conferences. The venues selected have added to the experience and have been part of the excellent service provided to participants."

Cllr Richard Greening, Chair of Islington Pension Fund



PORTFOLIO PORTRAIT

This is a high-quality exclusive print supplement about the sponsor portraying its expertise, heritage and future outlook written by a *portfolio institutional* journalist.

Our journalist will be briefed by the sponsor's communications team on the key messages and ideas for the content, and will develop a concept as a proposal, which may include interviews with the sponsor's leading portfolio manager, a profile of the CEO, or articles on key products/strategies. The sponsor has full content control and the last word on the sign-off, while *portfolio institutional* takes over the entire execution including design, layout, photo shoot, writing and editing and of course printing.

The best part of the deal for the sponsor is that this final supplement is distributed inside *portfolio institutional* to its readership (8,000) in the issue preferred by the client (min. 3 months booking notice).

EXCLUSIVE SPONSORSHIP PACKAGE

- Entire production (text and layout, printing, distribution) of a 12-page supplement
- Final content sign-off by sponsor
- Two full page display ads in supplement (IFC + OBC)
- Distribution inside *portfolio institutional* magazine
- Digital downloadable version on portfolio-institutional.co.uk
- Up to 2.000 hard copies for sponsor's own distribution
- High-res pdf with full syndication rights for clients own marketing purposes

Rate available upon request

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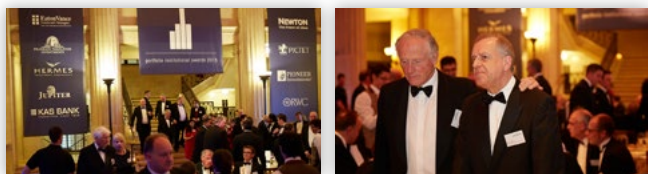
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PORTFOLIO INSTITUTIONAL AWARDS

The *portfolio institutional* awards honour investors who are exemplary and forward-thinking in their portfolio management or in a particular investment type or area. Asset managers and service providers can sponsor the annual *portfolio institutional* awards to exclusively endorse and represent an award in one of the ten categories, during the annual awards gala dinner. Asset managers and providers sponsoring the awards benefit from an extensive media and event package.

SPONSORSHIP PACKAGE

- Sponsor logo on all ongoing communication with investors/consultants
- Host a dinner table at the awards gala dinner
- Award presentation of your preferred category by a representative of sponsor
- Opportunity to place promotional items in the awards goody bag for all guests
- Company profile and logo on the awards website and at the awards gala venue on the night
- Editorial coverage in *portfolio institutional* in the issue after the awards gala

ATTENDEES

- **Asset owners**
Chairmen, CIOs, Pension fund managers, Investment team members
- **Investment consultants**
jury members and selected invited consultants
- **Sponsor representatives**
no additional table selling, no additional providers attending

"It's a great event! It is very well organised, there are some really bright people. It is by a credible organisation, the magazine really makes you think. It's a fantastic evening!"

James Kelly, Rentokil Initial

"I think the *portfolio institutional* awards are really great because you get some key individuals from the industry who attend the event. It is relatively small so you actually get to network and speak to lots of people who you actually would like to speak to."

Jill Barber, Franklin Templeton



PORTFOLIO INSTITUTIONAL CONFERENCE

This is a small interactive and in-depth conference for institutional investors and investment consultants. Each half-day themed investment conference is on a current and relevant topic for the institutional investment community. The event aims to provide delegates with an informal and relaxed atmosphere to encourage debate and engagement with the panel. A limited number of sponsorship packages are available for asset managers to attend and to speak at this invite-only event.

02 March, London LIQUIDITY CONFERENCE

July 2016, London DC INVESTMENT CONFERENCE



SPONSORSHIP PACKAGE

- Participation of a representative in a panel discussion
- Delegate passes to the conference
- Sponsor logo on all on-going promotional activities
- Sponsor logo on the conference material
- Display of marketing material in the networking lounge
- Full page ad in *portfolio institutional* (post-event issue)

Rate available upon request

ATTENDEES

- Asset owners
- Investment consultants
- Sponsor representatives

no additional providers attending

"Portfolio Institutional figures high on the list of publications that Association of Member Nominated Trustees consult. Conferences that the journal organises live up to that strong reputation. "Passive investment" was one such: well worth the time commitment."

David Weeks, Lovell Pension Scheme

"The high calibre panelists challenged conventional thinking."

Anthony Charwood, The Pensions Trust

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SALES



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MAGAZINE SPECIFICATIONS

Magazine size:	210 mm x 297 mm	Special colours:	On request
Type area:	188 mm x 255 mm	Resolution:	70er-Raster – 300 dpi
Trim: 3 mm		Data media:	CD-ROM, CD-RW, DVD-ROM, DVD-RW
Finish:	Perfect bound	Printing process:	Sheet offset ISO coated, FOGRA 39
Colours:	Eurokala – CMYK	Data format:	PDF X3

Material delivery: Please deliver via email to material@portfolio-verlag.com

ONLINE SPECIFICATIONS

Website data formats:	redirects, swf, gif, jpg and HTML5
Newsletter data formats:	jpeg, gif (non-animated!)
Max. data size	70 KB
Finish:	by e-mail no later than 3 working days prior to start of campaign

Material delivery: Please deliver via email to online@portfolio-verlag.com, stating the advertiser name, format, running time for the material and contact.

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Sort code:	30-95-74
IBAN:	GB07LOYD30957433702760
BIC:	LOYDGB21027

PAYMENT TERMS

Payments are due within 7 days from receipt of invoice. A 2% cash discount will be given for prepayments or payments received prior to the relevant publishing date (must be advised and agreed when making the booking) unless, previous invoices are still outstanding. Payment by direct debit or cheque is not possible.

STANDARD TERMS AND CONDITIONS

The publisher's standard terms and conditions apply to the processing of orders. You can find these at:
www.portfolio-institutional.co.uk/terms

