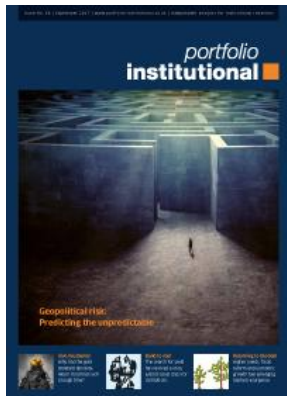


# Portfolio Institutional 2018

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.

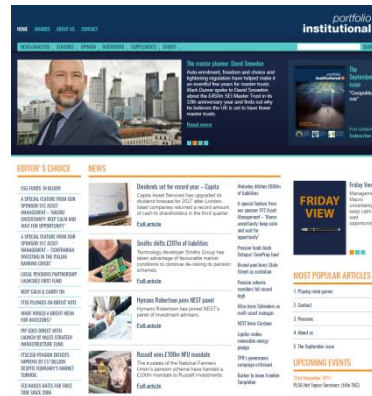
The content is distributed to our audience via a print product and digitally via the site and newsletter



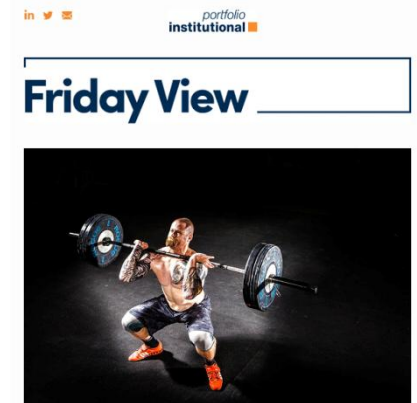
Magazine



Roundtables



Site

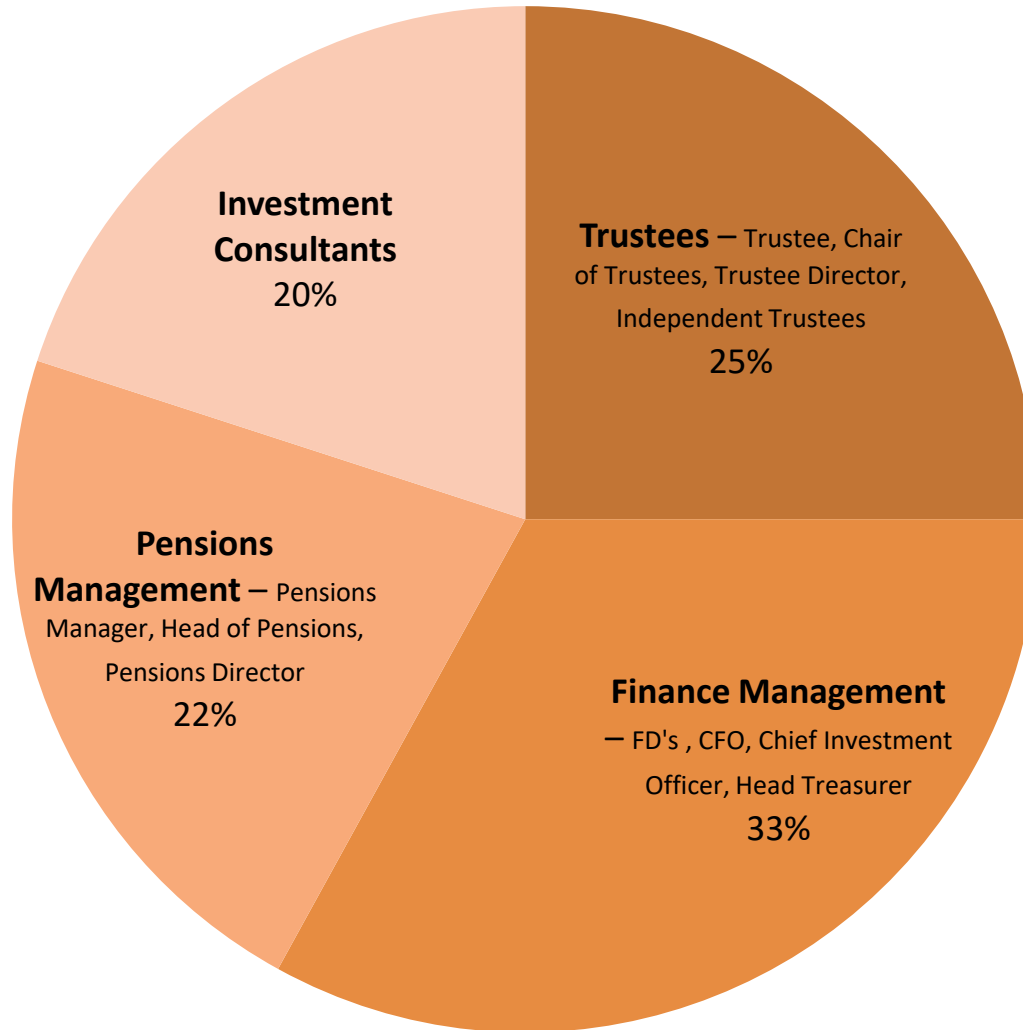


Weekly Newsletter



# 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:

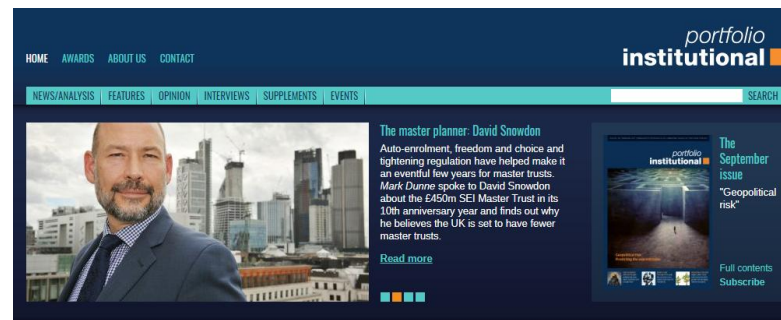
- Monthly Unique Users = 2,700

- 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



Friday View  
Management  
Macro  
uncertainty  
keep calm  
wait  
opportunity

### 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

## March 2018

- Raising Standards in ESG - Feature for sponsors and research
- **Scheme Excellence and Innovation – Category - Local Authorities**

- Features on Investment topics - Passive vs. Active - Factor Based Investing - Multi Asset – Alternatives
- **Round table – Multi Asset – sits 22/2/18 – 1 sponsor space available**

## April 2018

- Raising Standards in ESG – Feature for sponsors
- **Scheme Excellence and Innovation - Category – Infrastructure**

- Investment topics – Property - Asset Services - Alternative Credit - Emerging Markets - Fixed Income
- **Round table – ESG – sits 22/3/18 – 1 sponsor space available**

## May 2018

- Raising Standards in ESG – Feature for sponsors
- **Scheme Excellence and Innovation – Category - Liability & Cash based Investment strategies**

- Investment topics - Liquid Alternatives – De-risking - Real Return - Emerging Market Debt
- **Round table – Risk Reduction or a topic of your choice – sits 26/4**

## June 2018

- Raising Standards in ESG – Feature for sponsors
- **Scheme Excellence and Innovation – Category – Alternatives**

- Investment topics - Smart Beta - Insurance - Income - Defined Benefit Strategies - Portfolio Structure
- **Round table - Responsible Investing - sits 24/5/18 – one space available**

# 2018 Full Schedule

## September 2018

- Raising Standards in ESG – Feature for sponsors
- **Scheme Excellence and Innovation – Category - Multi Asset**

- Investment topics - Asset Allocation - Diversified Growth Funds - Bulk Annuities – Deficit Management
- **Round table - Diversified Growth Funds – sits 28/6/18 – 1 sponsor space available**

## October 2018

- Raising Standards in ESG – Feature for sponsors
- **Scheme Excellence and Innovation – Category – Responsible Investment**

- Investment topics - Buyouts and Buy-in - Fiduciary Management - High Yield - Emerging Debt
- **Round table – Equities – sits 6/9/18**

## November 2018

- Raising Standards in ESG – Feature for sponsors
- **Scheme Excellence and Innovation – Category - Emerging Markets**

- Investment topics - Emerging Equities - Global Trading - Impact Investing - Customised Investing
- **Round table – Property – sits 4/10/18 – 1 sponsor space available**

## December/January 2018/19

- Raising Standards in ESG – Feature for sponsors
- **Scheme Excellence and Innovation – Category – Investment Innovation**

- Investment topics - Liquid Alternatives - De-risking - Real Return - Emerging Market Debt
- **Round table - Multi Asset/Alternative Credit – sits 8/11/18 – 1 sponsor space available**

# Raising Standards in ESG – 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 Managers to communicate their ESG strategies and solutions to pension funds and schemes to learn which options resonate with them.

## 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 full results and they will be used for the feature
- 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

### ON THE RADAR



#### 2018: The year of the human?

Mark Dunne

Tuesday 23rd January 2018

Cyber crime, greater disclosure, fixed income, people and, of course, climate change. Welcome to what could make the headlines in ESG during 2018.

Responsible investing is not what it used to be. Gone are the days when ethically-minded investors simply sought to avoid companies selling guns, drilling for oil or distilling vodka.

*"Clients are demanding ESG frameworks across fixed income because for a lot of them it is the biggest proportion of what they own."*  
Matt Moscardi, MSCI ESG Research

Today, these people are using their cash to make an impact. Rather than avoid certain industries they want to help build a better world by supporting companies that are working to make a difference.

So ethical investing has evolved into environmental, social and governance (ESG) standards, which promote transparency, health and safety, diversity, protecting the planet and eradicating poverty.

## **Pension Fund Excellence & Innovation – new monthly campaign from Portfolio Institutional:**

**Goal:** To highlight the amazing work undertaken by UK pension funds and create a must see section of the magazine. We will be highlighting three pension funds, their teams, a portfolio on the scheme and understanding about their experience in the sector each month on a different asset class in every issue.

This provides sponsors a section to promote their offerings in this asset class to our audience. This will drive awareness for the sponsors brand, experience and views.

- **March – Local Authorities**
- **April – Infrastructure**
- **May – Liability or Cash based Investment strategies**
- **June – Alternatives**
- **September – Multi Asset**
- **October – Responsible Investment**
- **November – Emerging Markets**
- **Dec/January – Investment Innovation**



## Options for 2018

### Option a) Work from plan

- **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**
- **Raising Standards in ESG – full sponsorship – £28.8k**

Portfolio offer volume discounts and value added for multiple bookings

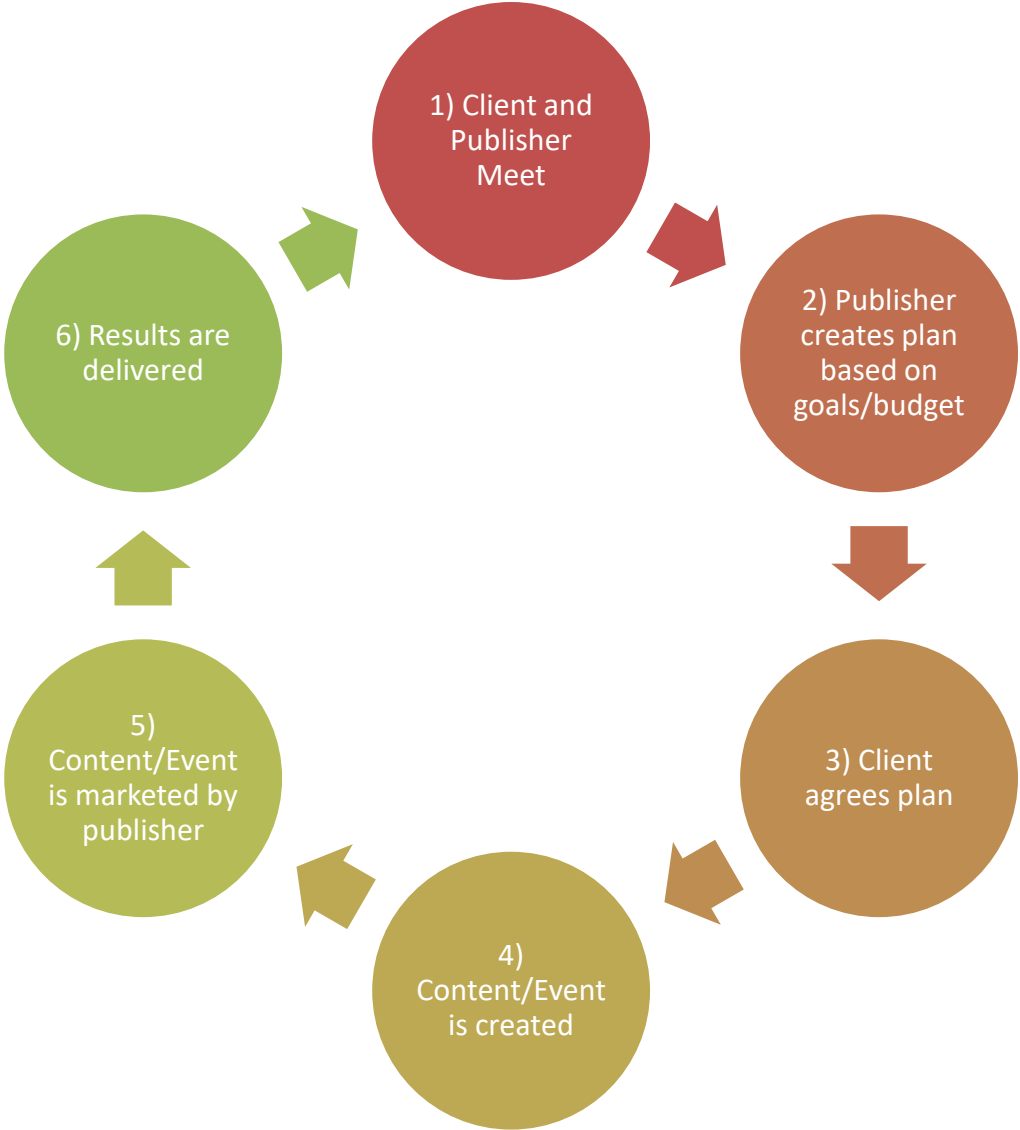
### b) Fully bespoke

- **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.

# 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

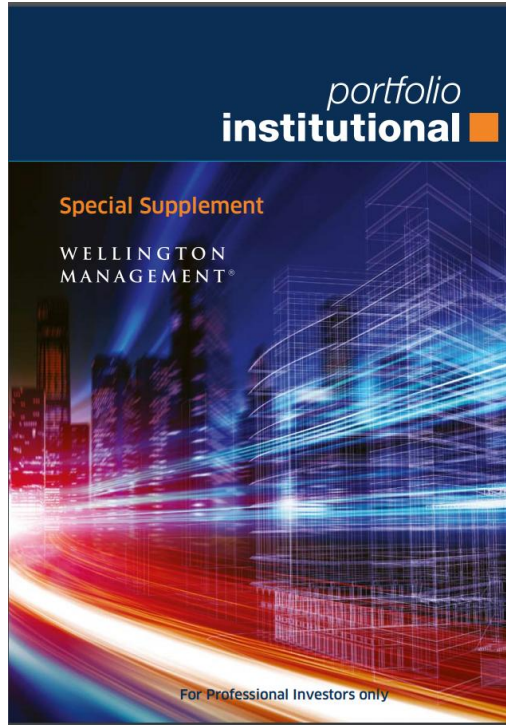
By Mike Clements, head of European equities at SVZ Asset Management

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

# Thank you

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