

PORTFOLIO INSTITUTIONAL

portfolio
institutional ■

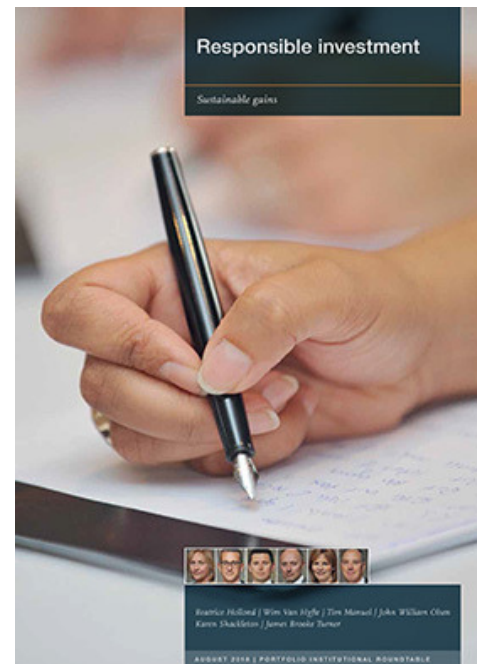
WHAT WE DO

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



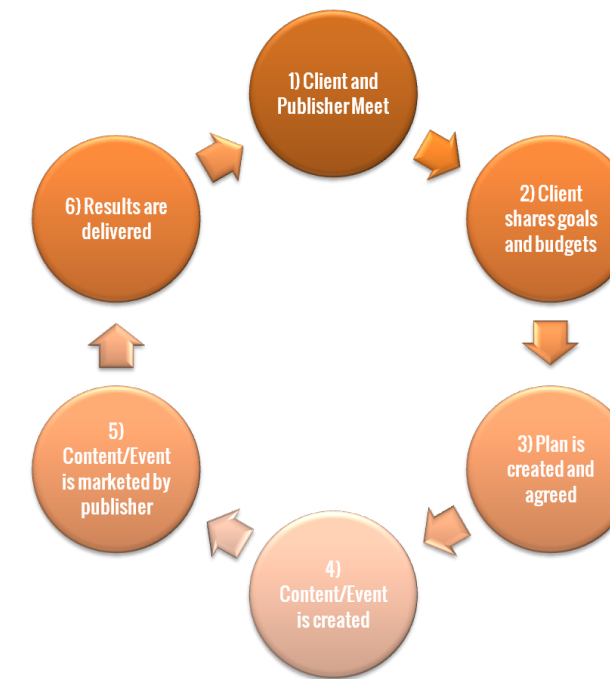
Magazine



Roundtables



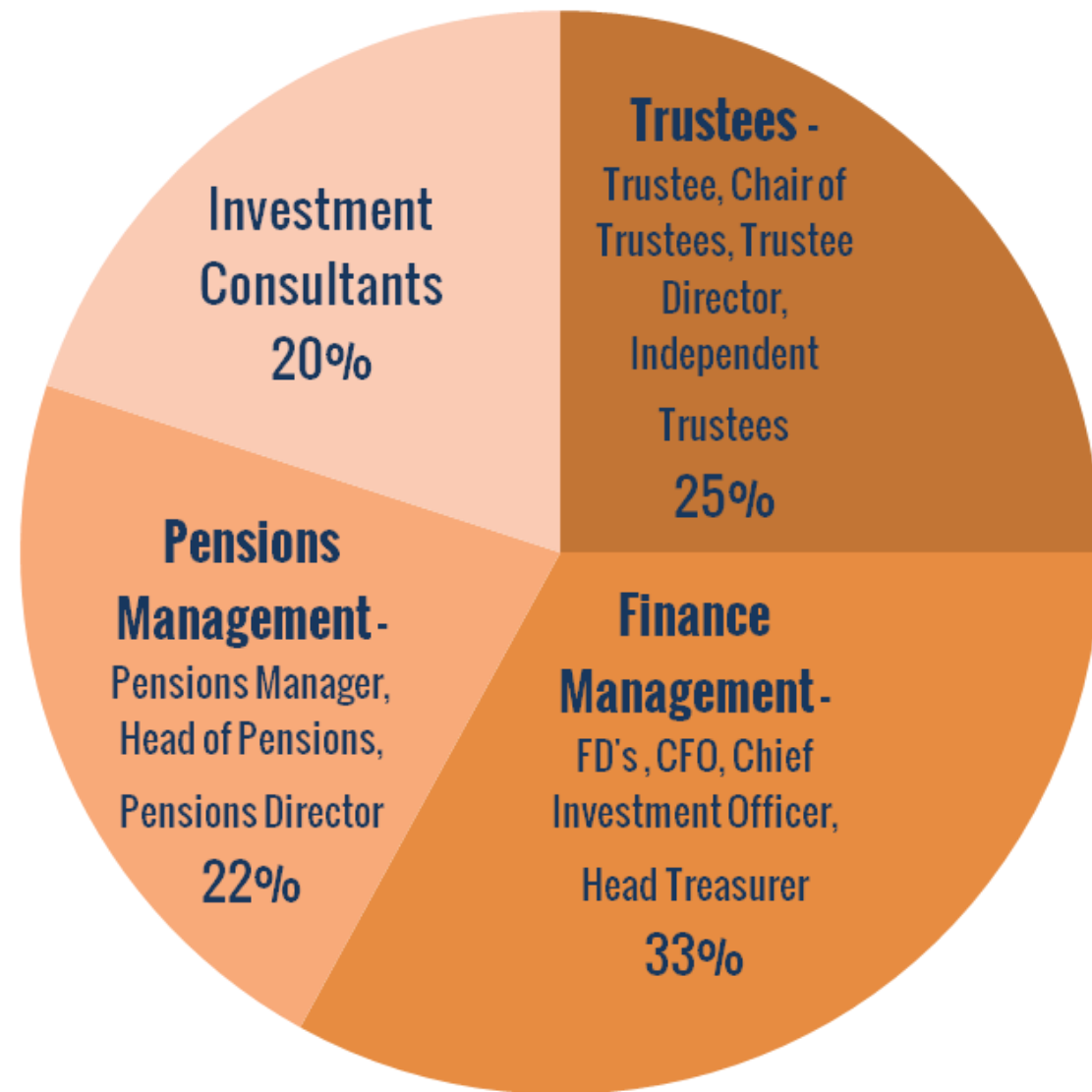
Site & Newsletter



Bespoke

STATISTICS

PRINT STATS:



8,000 copies sent to:
UK's top largest DB and DC pensions funds by assets under Management

DIGITAL STATS:



3,700 monthly unique users
23,300 monthly page impressions

OFF THE SHELF PACKAGES INCLUDE:

Display advertising

Sponsored articles

Roundtable packages

Monthly expert panels

Scheme Excellence - advertising or interview

COSTS:

Page advertising - **£5.8k**

Page advertorial - **£6.2k**

Page interview - **£7.2k**

Roundtables - to be one of the three sponsors - **£12k**

Expert panels: - Raising Standards in ESG | Buy-in, Buy-out Panel | Fiduciary Management Panel - all **£28.8k**

Events - evening or breakfast on topics of your choice

***Portfolio offer volume discounts and value added for multiple bookings**



BNP PARIBAS
ASSET MANAGEMENT

The asset manager
for a changing
world

portfolio
institutional

2018 PLAN

SEPTEMBER ISSUE:

- Roundtable - Diversified Growth Funds
- Scheme Excellence - Smart Beta
- ESG
- Feature one - Millennial's
- Feature two - Mastertrusts

OCTOBER ISSUE:

- Extra Circulation at the PLSA Conference
- Roundtable - Emerging Markets - sits on 6th September
- Scheme Excellence - Private Equity
- ESG
- Feature one - Multi Asset
- Feature two - Emerging Markets Debt

NOVEMBER ISSUE:

- Roundtable - Property - sits on 4th October
- Scheme Excellence - Credit
- ESG
- Feature one - Picking an Active Asset Manager
- Feature two - Cash Flow Driven Investment

DECEMBER ISSUE:

- Roundtable - Multi Asset - sits on 8th November
- Scheme Excellence - Global Equities
- ESG
- Feature one - Currency Risk
- Feature two - Passive Investing

2019 PLAN

FEBRUARY:

- **Roundtable - Alternatives**
- **Scheme Excellence - Fixed Income - Absolute Returns**
- Expert Panel - ESG
- Expert Panel - Buy-in & Buy-out
- Expert Panel - Fiduciary Management
- Local Authority Pooling Feature
- Pension Fund Interview
- Feature one - **Cashflow Management**
- Feature two - **Emerging Equities**
- Feature three - **Infrastructure-Debt**
- Bespoke Event -Topic TBC

MARCH - EXTRA CIRCULATION AT PLSA INVESTMENT CONFERENCE:

- **Roundtable - ESG Responsible Investment - Impact Investment**
- **Scheme Excellence - Equities - UK**
- Expert Panel - ESG
- Expert Panel - Buy-in & Buy-out
- Expert Panel - Fiduciary Management
- Local Authority Pooling Feature
- Pension Fund Interview
- Feature one - **Fixed Income - Emerging Markets**
- Feature two - **MultiAsset**
- Feature three - **Liability Driven Investment**
- Bespoke Event - Topic TBC

APRIL:

- **Roundtable - Cashflow Driven Investment - Liability Driven Investment**
- **Scheme Excellence - Infrastructure - Equity**
- Expert Panel - ESG
- Expert Panel - Buy-in & Buy-out
- Expert Panel - Fiduciary Management
- Local Authority Pooling Feature
- Pension Fund Interview
- Feature one - **Real Assets**
- Feature two - **Equities-Large Cap**
- Feature three - **Private Equity**
- Bespoke Event - Topic TBC

2019 PLAN

MAY:

- **Roundtable - Multi Asset**
- **Scheme Excellence - Alternative Investment**
- Expert Panel - ESG
- Expert Panel - Buy-in & Buy-out
- Expert Panel - Fiduciary Management

- Local Authority Pooling Feature
- Pension Fund Interview
- Feature one - **Fixed Income - Corporate Bonds**
- Feature two - **Target Returns**
- Feature three - **Factor Investing**
- Bespoke Event - Topic TBC

JUNE:

- **Roundtable - Property - Infrastructure - Real Assets**
- **Scheme Excellence - Liability Driven Investment**
- Expert Panel - ESG
- Expert Panel - Buy-in & Buy-out
- Expert Panel - Fiduciary Management

- Local Authority Pooling Feature
- Pension Fund Interview
- Feature one - **High Yield**
- Feature two - **Corporate Bonds**
- Feature three - **Equities-Global**
- Bespoke Event - Topic TBC

SEPTEMBER:

- **Roundtable - Equities - UK Equities - Global Equities**
- **Scheme Excellence - Smart Beta**
- Expert Panel - ESG
- Expert Panel - Buy-in & Buy-out
- Expert Panel - Fiduciary Management

- Local Authority Pooling Feature
- Pension Fund Interview
- Feature one - **Liquidity**
- Feature two - **Fixed Income - Unconstrained**
- Feature three - **Private Equity**
- Bespoke Event - Topic TBC

2019 PLAN

OCTOBER:

- **Roundtable - Fixed Income Strategies - Public Debt**
- **Scheme Excellence - Infrastructure - Finance**
- Expert Panel - ESG
- Expert Panel - Buy-in & Buy-out
- Expert Panel - Fiduciary Management
- Local Authority Pooling Feature
- Pension Fund Interview
- Feature one - **Equities - Thematic**
- Feature two - **Fixed Income - Bonds**
- Feature three - **High Yield**
- Bespoke Event - Topic TBC

NOVEMBER:

- **Roundtable - Factor Based Investing - Private Equity**
- **Scheme Excellence - Fixed Income**
- Expert Panel - ESG
- Expert Panel - Buy-in & Buy-out
- Expert Panel - Fiduciary Management
- Local Authority Pooling Feature
- Pension Fund Interview
- Feature one - **Real Assets**
- Feature two - **Liquidity**
- Feature three - **Alternatives**
- Bespoke Event - Topic TBC

DECEMBER / JANUARY:

- **Roundtable - Emerging Markets - Emerging Market Debt**
- **Scheme Excellence - Multi Asset**
- Expert Panel - ESG
- Expert Panel - Buy-in & Buy-out
- Expert Panel - Fiduciary Management
- Local Authority Pooling Feature
- Pension Fund Interview
- Feature one - **Costs/Transparency**
- Feature two - **Equities - US**
- Feature three - **Absolute Return**
- Bespoke Event - Topic TBC

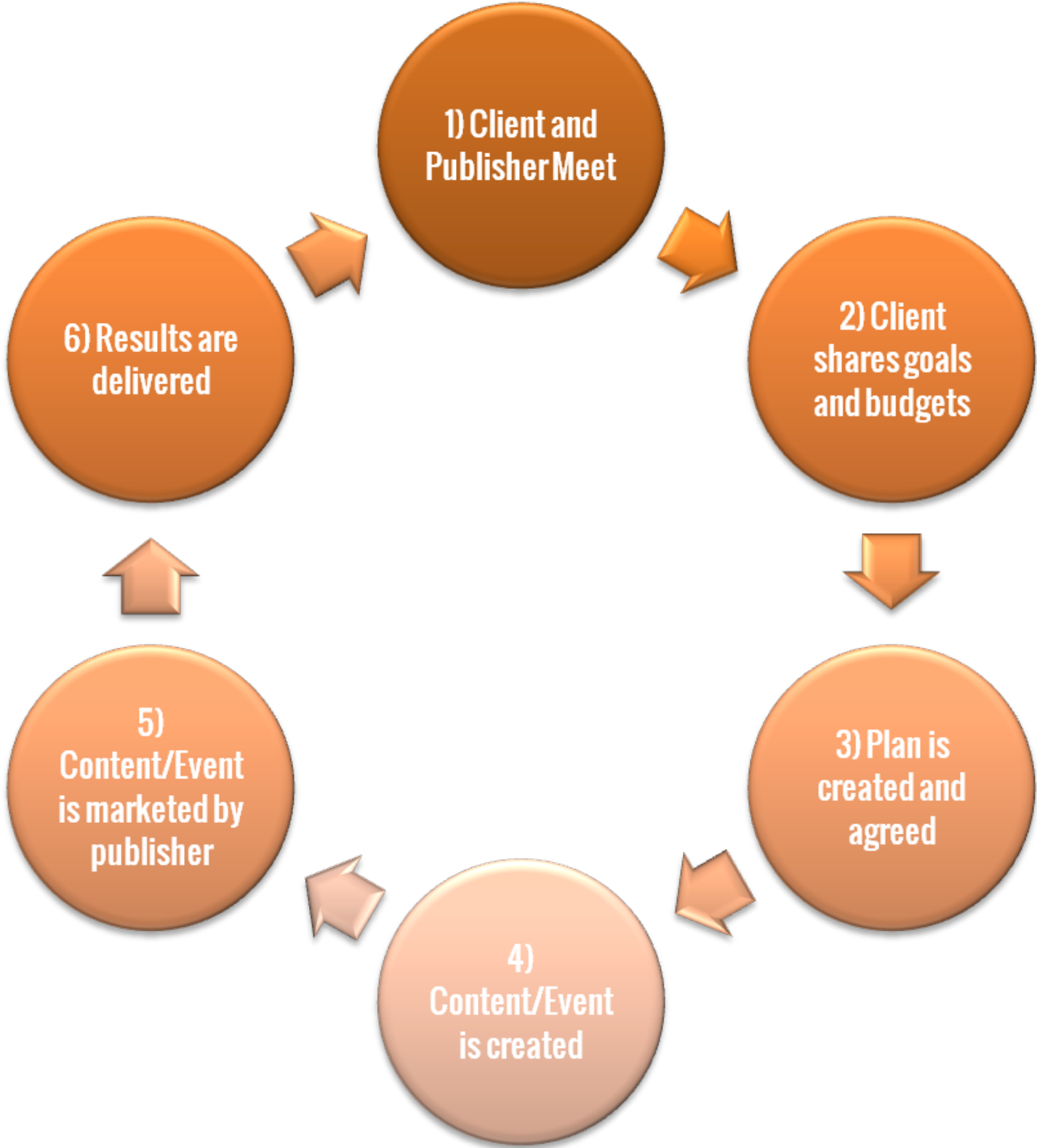
2019 ROUNDTABLES

Topic	Sits	Article and advert due	Published
Alternatives	06/12/2018	14/01/2019	February
ESG Responsible Investment-Impact Investment	07/02/2019	11/02/2019	March
Cashflow Driven Investment-Liability Driven Investment	07/03/2019	11/03/2019	April
Multi Asset	11/04/2019	15/04/2019	May
Property-Infrastructure-Real Assets	16/05/2019	13/05/2019	June
Equities-UK Equities-Global Equities	13/06/2019	12/08/2019	September
Fixed Income Strategies-Public Debt	09/09/2019	16/09/2019	October
Factor Based Investing-Private Equity	10/10/2019	14/10/2019	November
Emerging Markets-Emerging Market Debt	07/11/2019	11/11/2019	December/January

*all dates are subject to change



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



Newton – Sustainable Bond Investing

Wednesday 25th April 2018

The significant growth in sustainable and responsible investing over the last few years has until recently been focused on equity portfolios. However, investors are now starting to appreciate how such an approach can also be applied to fixed income. In this article, Newton's Scott Freedman and Victoria Barron review some of the developments in this area and explain how we integrate responsible investment in our fixed-income investment process.

[View whitepaper](#)

Reach



Manuela von Dillfurth,
Senior Portfolio Manager,
Invesco Quantitative Strategies

Andreas Hoegner
Visiting Professor of Finance,
Henley Business School

Whitepaper: Sustainable Factor Investing

This document is intended only for Professional Clients and Financial Advisers in Continental Europe (as defined in the important information) for Qualified Investors in Switzerland; for Professional Clients in Dubai, Ireland, the Isle of Man, Jersey and Guernsey, and the UK, for Institutional Investors in the US and Australia, for Institutional/Accredited Investors in Singapore, for Professional Investors only in Hong Kong, for existing Qualified Institutional Investors in Japan; for Wholesale Investors (as defined in the Financial Markets Conduct Act) in New Zealand; and for accredited investors as defined under National Instrument 45-106 in Canada.

1. Executive summary

The advent of what might be called sustainable factor investing has positive implications for the sphere of investment and beyond. It meets two compelling exigencies that have emerged over the course of several decades and in recent years in particular: the appetite for evidence-based investing and the desire for a better world.

We explain how two of the most fascinating stories in the annals of finance have brought us to this point. The first starts with the birth of "modern finance" before charting the gradual erosion of conventional wisdom regarding risk, reward and stock selection. The second chronicles the rise of responsible investing and the ever-growing consideration of environmental, social and governance issues in portfolio construction.

In a world increasingly averse to risk and ever more rightly intolerant of injustice and inequality, sustainable factor investing has become a core component of our philosophy of long-term asset management. We demonstrate both the importance and the effectiveness of such an investment ethos.

2. Introduction

There was a time when the most elegant and revered modes in finance were rooted in a firm belief in the efficiency of markets and the rationality of human beings. There was also a time when those same markets and human beings showed comparatively little interest in concerns such as diversity, employee relations or even the future of the planet. Thankfully, times change.

The realization that even the finest theoretical equations might not always hold true in the real world - particularly when that world is inhabited by creatures perilously susceptible to cognitive error - has paved the way for new and more sophisticated investment strategies. Meanwhile, the wider recognition that our shared destiny depends in no small part on a collective desire to work for the greater good has led to a much richer appreciation of the importance of sustainability.

These shifts, which have occurred over the course of several decades and are still developing today, have brought with them two key corollaries: the rise of factor investing and the emergence of environmental, social and governance (ESG) considerations in assessing an organisation's practices, function and broader impact. Now the two are increasingly converging, and the result is what we might call sustainable factor investing - a phenomenon whose implications for the sphere of investment and beyond are potentially far-reaching.

In this white paper we examine how this synergy has come about, what it means today and where it might lead. We begin by investigating the histories of factors and ESG respectively; we explore how their stories have more recently become entangled; and we demonstrate the benefits of an investment philosophy that takes proper and rigorous account of both.

In doing so we draw on a range of empirical research and analyse the contributions of some of the most influential figures in the annals of finance. We also look to the academic arena for an external perspective. Finally, we explain how sustainable factor investing has become central to our own ideas about long-term asset management, underpinning an investment ethos that thrives on dialogue and transparency and prizes ownership over speculation.

"The result is what we might call sustainable factor investing - a phenomenon whose implications for the sphere of investment and beyond are potentially far-reaching."

Teach



Meet

Thank You

For more information please contact:

Tabi Tebbatt - Sales and Marketing Executive

T.Tebbatt@portfolio-institutional.co.uk

Clarissa Huber - Head of Sales

C.huber@portfolio-institutional.co.uk

DD: 0207 822 8522

John Waterson - Publisher

j.waterson@portfolio-institutional.co.uk

Tel: 0207 822 8522

