PORTFOLIO INSTITUTIONAL

portfolio
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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.

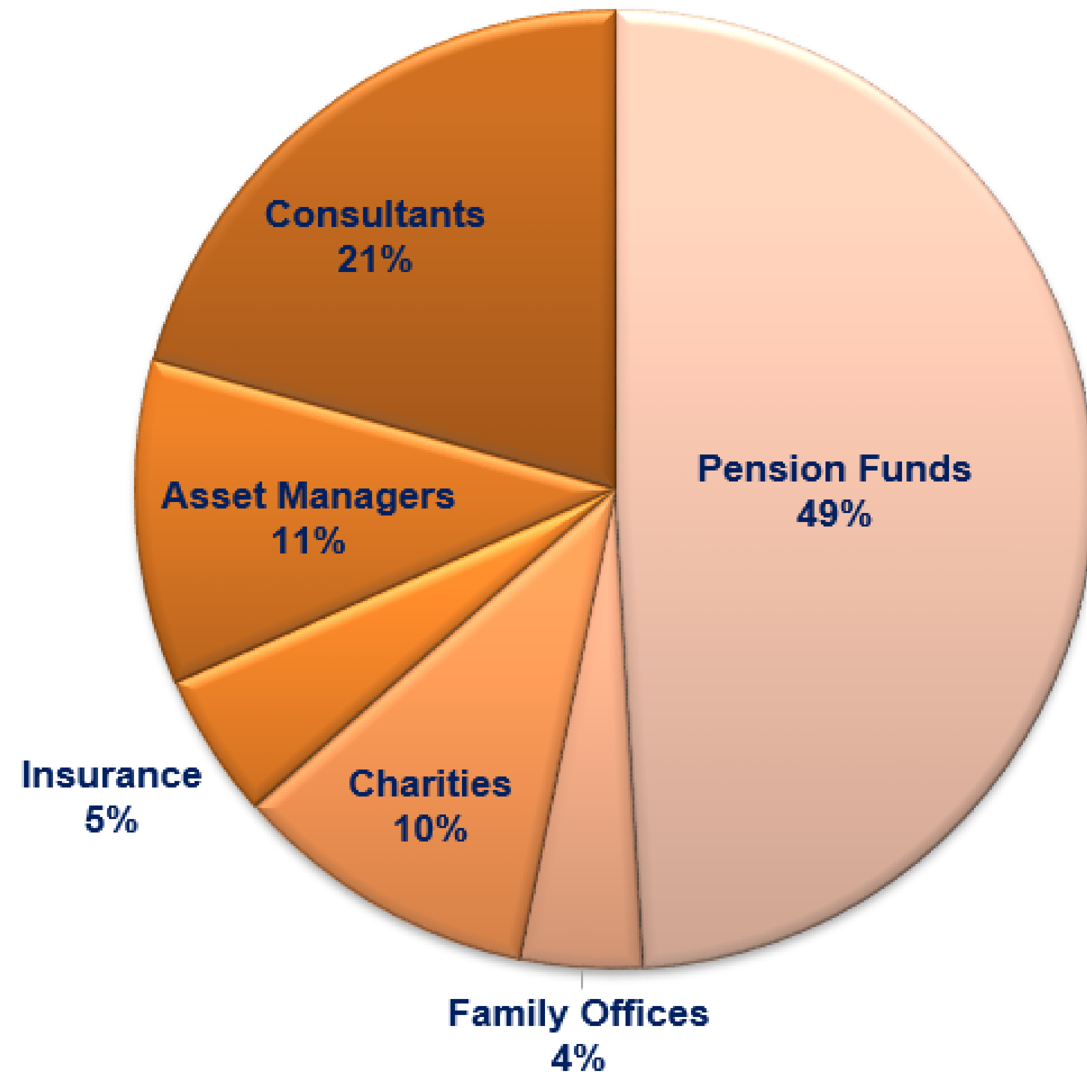
Interview: Richard Williams

Piecing together the pooling puzzle

ESG: What lies beneath?

STATISTICS

PRINT STATS:



6,147 copies sent to:
The UK's biggest DB and DC pension funds and investors

READERSHIP BY JOB TITLE:

Finance management:

- CFO
- FD
- FC
- CIO
- FM
- CEO
- IO
- Treasurers

Pension management:

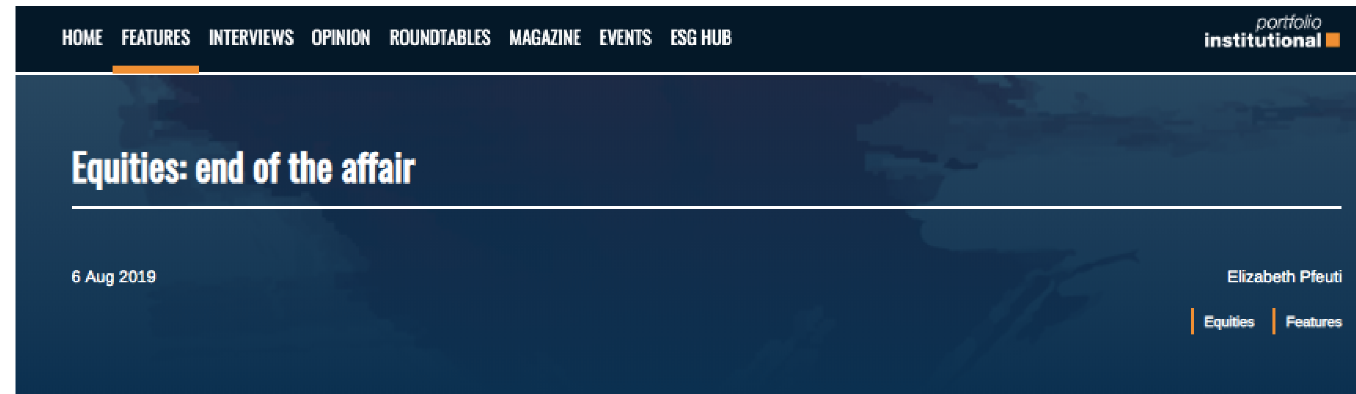
- Pension manager
- Head of pensions
- Pensions director

Trustees:

- Independent trustees
- Trustee director
- Chair of trustees

STATISTICS

DIGITAL STATS:



Nothing lasts forever, or at least nothing stays the same, and after a decades-long love affair, institutional investors and public equities have come to a crossroads.

Over the past 12 months, the allocation made to equities by UK defined benefit (DB) pension funds shrank at its most rapid annual rate in more than 15 years, according to Mercer's 2019 Asset Allocation Survey. A 5% reduction was higher than even the 4% move between the crisis years of 2008 and 2009.

Today, UK DB pensions allocate 20% on average to equities, with just 6% destined for the London Stock Exchange. In 2003, the total allocation was 68%.

Within Europe, UK investors are not alone. The average allocation among the largest pension fund investing countries is in 2019 just 25%.

After the longest equity bull run on record – still going at the time of going to press – this might initially seem counterintuitive, but equities have been partially the architect of their own downfall.

3,700 monthly unique users
19,200 monthly page impressions

NEWSLETTER STATS:

NEWSLETTER

The power of engagement

ESG does not end when an investment decision is made; the hard work is just beginning. Mark Dunne takes a look.

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LATEST ARTICLES

Factor investing: Growing pains

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Corporate bonds: Trapped

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Newton opinion: Sustainability is the new black

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Newton opinion: Charting the course

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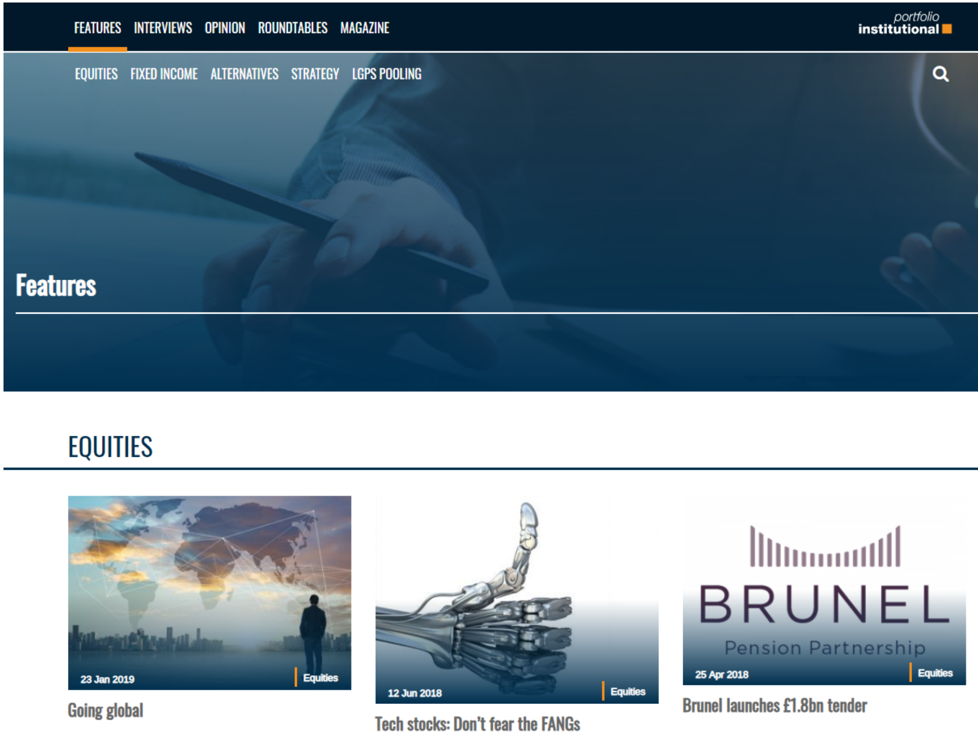
4,000 opted in subscribers
15% click through rate

WHAT WE OFFER

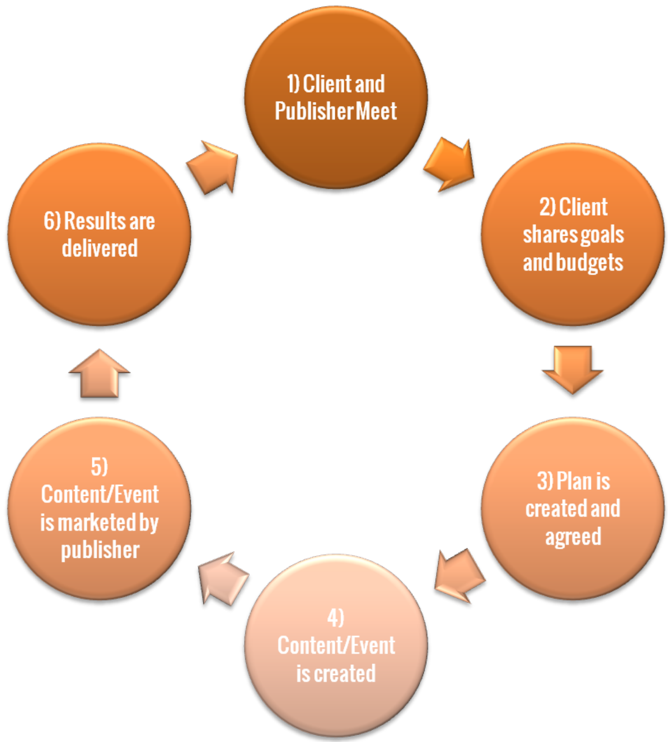
The content is distributed to our audience via a print product and digitally via the site and newsletter

Magazine

Roundtables



Site & Newsletter



Events

OFF THE SHELF PRINT PACKAGES INCLUDE:

COSTS:

Page advertising - **£3.8k**

Page advertorial - **£5.2k**

Page interview - **£6k**

ESG Expert Panel - **£28.8k**

Portfolio Insight - **£9.5k**

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

Events - evening or breakfast on topics of your choice

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

ESG EXPERT PANEL

ESG coverage in 2019:

March – Social: A look at the “S” in ESG

April – Engagement

May – Governance

June – Climate change

September – Fixed income

October – Measuring outcomes and impacts

November – Diversity

Dec-Jan 2020 – ESG outlook

Costs:
3 months: £16k
6 months: £22k
12 months: £28.8k

ESG | Opinion

Failing to engage?

Shareholders’ success in getting fossil fuel companies to cut their carbon footprint is questionable.

Engagement is not working. Despite a reported increase in shareholder activism in recent years, it appears that only a small fraction of the huge revenues generated by oil and gas companies is spent on tackling global warming, research shows.

Shareholders only squeezed 1.3% out of energy companies’ investment pots to fund low carbon projects in 2018, according to environmental-focused investment researcher CDP.

Oil and gas companies account for more than half of all greenhouse gas emissions globally, a stat that means the industry and sustainably-led investment funds should not make natural bedfellows.

Yet institutional investors following such strategies are taking positions in energy giants like Shell and BP. The idea, they argue, is to work with the polluters to get them to fund cleaner power sources. So they are trying to solve the problem from within rather than just ignoring it by divesting.

Climate change has become a mainstream issue. Sir David Attenborough made a speech to the UN towards the end of 2018 warning that this is the greatest threat to humanity in thousands of years. When he gets involved you know that an issue it is too serious to ignore.

The speech followed the publication of research from not one, but two sources – Nature, Earth System Science Data and Environmental Research Letters –predicted that carbon emissions would reach an all time high in 2018. Increasing use of oil and gas has been blamed, yet the UK managed to cut its footprint.

Indeed, the overall picture in Europe is brighter where 7% of energy companies’ capital expenditure funded cleaner technologies in 2018. Equinor (formerly known as Statoil), Total and Shell sit at the top of the list, while ExxonMobil and Rosneft are just two of the companies that brought the global average down.

Investor pressure and regulation has led to 15 of the 24 oil and gas companies monitored by CDP setting climate-reduction targets. One recent addition is Shell. It will set short-term targets to help halve its carbon

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PORTFOLIO INSIGHT

Package includes:

Topic of your choice

One full page advert

Two page position paper

Two page interview

PDF of Portfolio Insight

E- Supplement of Portfolio Insight

Published on our website

2x newsletter and social media push

Cost: £9.5k

Auf dieser Seite ein Interview, geführt von der Redaktion.

Mit einem Investor nach Ihrer Wahl

The day of the DGF is perhaps yet to come when markets trip up, that is when you can really see if they do what they say.

Portrait Redakteur

INSTITUTIONAL INSIGHT

Portrait Investor

YOUR LOGO

2020 ROUNDTABLES

Topic	Sits	Article and advert due	Published
Alternatives	16/01/20	17/01/20	February
Fixed Income - Debt	13/02/20	14/02/20	March
ESG	19/03/20	20/03/20	April
CDI	23/04/20	24/04/20	May
Emerging Market Debt	14/05/20	15/05/20	June
DC	18/06/20	19/06/20	July
Factor Based Investing	16/07/20	17/07/20	September
Responsible Investment	17/09/20	18/09/20	October
Multi-Asset	15/10/20	16/10/20	November
Outlook 2020 Conference	15/11/20	16/11/20	December/January

★ **Fully booked - no spaces available**

Possible topics:
Equities/Infrastructure/Fintech/Pooling/Fiduciary Management/LDI/De-Risking/Real Estate

***all dates are subject to change**

ROUNDTABLE REVIEWS

"Absolutely TOP. A very good balance between PMs and users of the asset class, which allowed for a good contrast of points of views."

"I thought that the discussion was excellent with all delegates contributing and well chaired by Mark. The level of expertise and knowledge was very high."

"High quality, well organised, would be a pleasure to attend again."

OFF THE SHELF DIGITAL PACKAGES INCLUDE:

ONLINE:

Billboard (970 x 250) - **£250 p/week**

MPU (300 x 250) - **£150 p/week**

Double MPU (300 x 600) - **£250 p/week**

Please contact for special offerings e.g. site takeover

NEWSLETTER:

Billboard (970 x 250) - **£250 p/week**

Text ad - **£350 p/week**

NEWSLETTER

The power of engagement

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2019 PLAN

OCTOBER- EXTRA CIRCULATION AT THE PLSA:

- **Roundtable - Private Debt**
- Institutional Insight
- Expert Panel - ESG
- 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 - Responsible Investing**
- Institutional Insight
- Expert Panel - ESG
- Local Authority Pooling Feature
- Pension Fund Interview
- Feature one - **Real Assets**
- Feature two - **Liquidity**
- Feature three - **Alternatives**
- Bespoke Event - Topic TBC

DECEMBER/JANUARY:

- **Roundtable - Real Assets**
- Institutional Insight
- Expert Panel - ESG
- Local Authority Pooling Feature
- Pension Fund Interview
- Feature one - **Costs/Transparency**
- Feature two - **Equities - US**
- Feature three - **Absolute Returns**

PORTFOLIO INSTITUTIONAL PARTNERSHIPS

Association of Member Nominated Trustees

Room151

Local Government Treasury, Technical & Strategic Finance

2020 PLAN

COMING SOON...

Thank You

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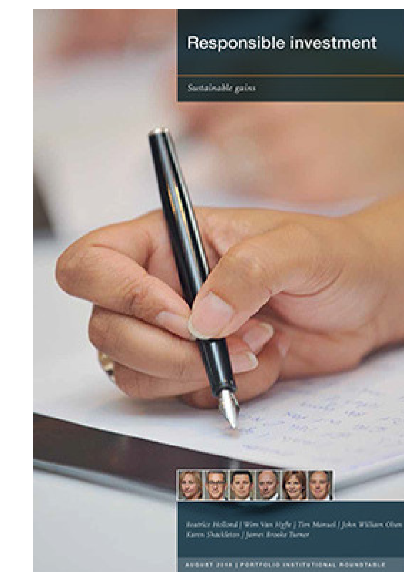
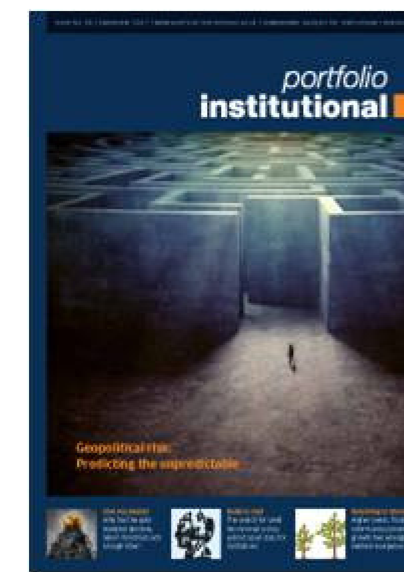


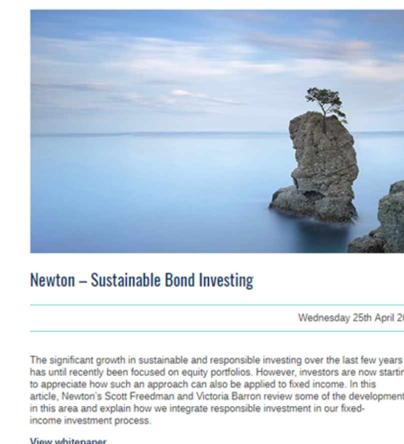


Invesco

Whitepaper: Sustainable Factor Investing

1. Executive summary

2. Introduction



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

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