

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.



Interview: Richard Williams



Piecing together the pooling puzzle

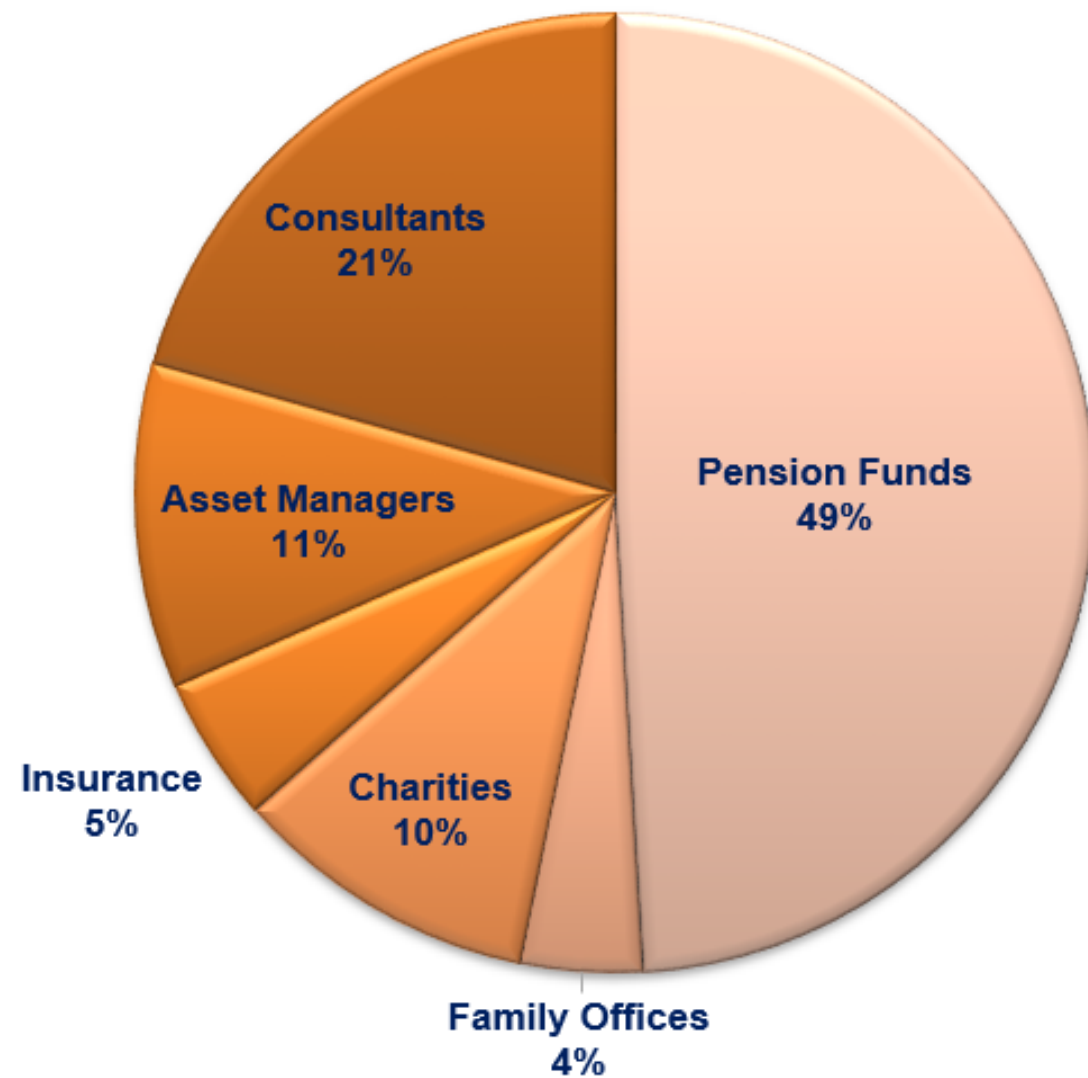


ESG: What lies beneath?



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

Pension management:

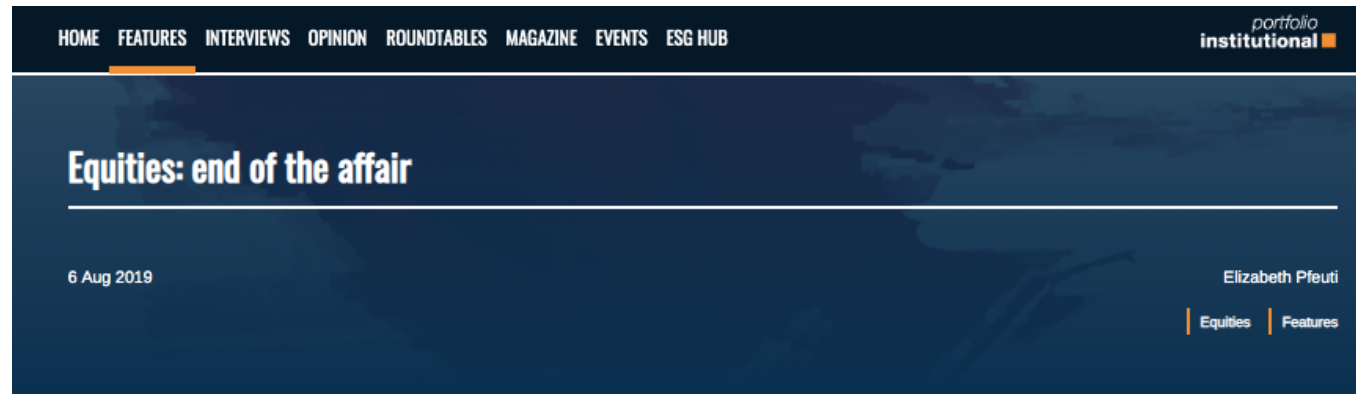
- Pension manager
- Head of pensions
- Pensions director

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.

4,200 monthly unique users
7,900 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.

[Read more](#)



Responsible Investment - Where Are You on Your Journey?

Participate in Aon's Global Responsible Investment Survey to see where you are relative to other institutional investors. We want to hear your views!



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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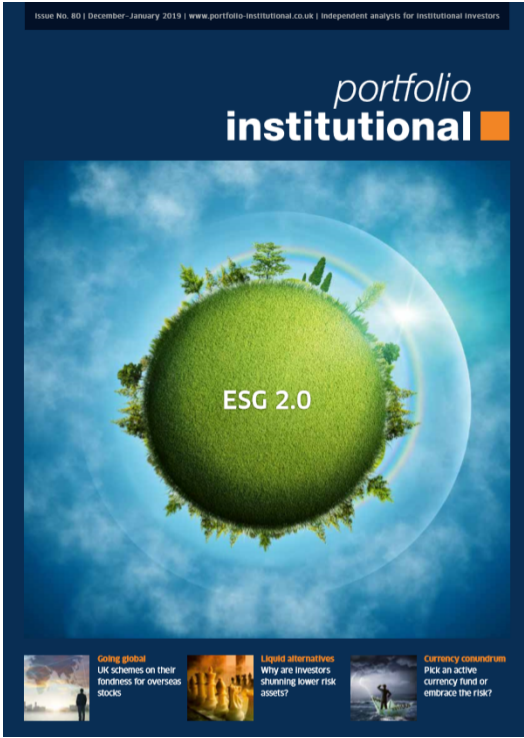
Newton opinion: Charting the course

[Read more](#)

4,000 opted in subscribers
15% click through rate

WHAT WE OFFER

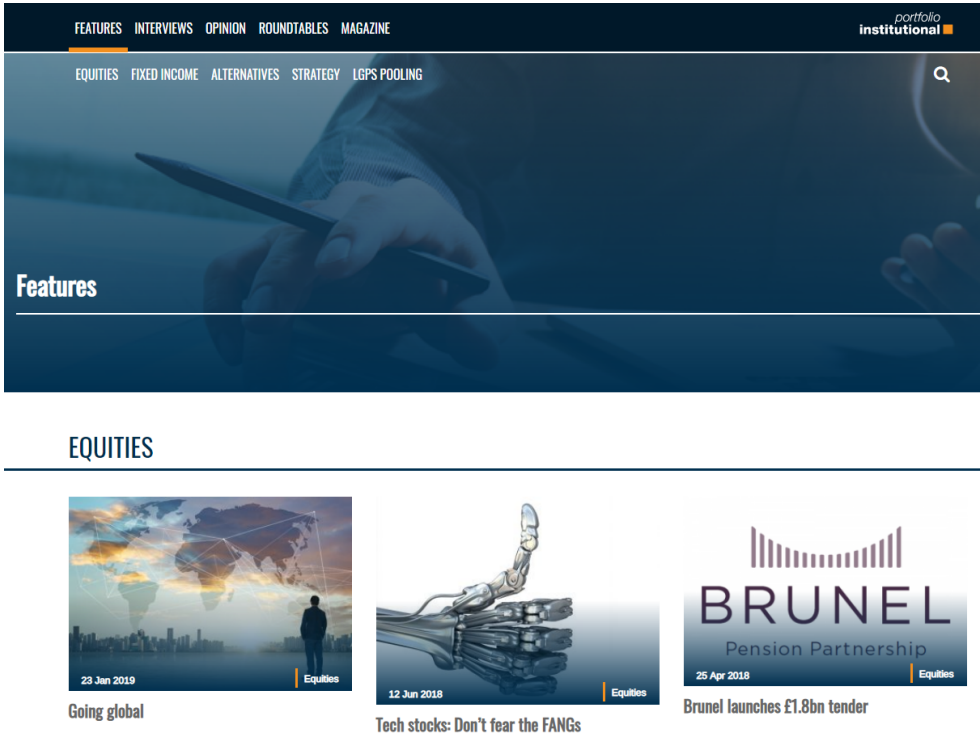
The content is distributed to our audience via a print product and digitally via the site and newsletter



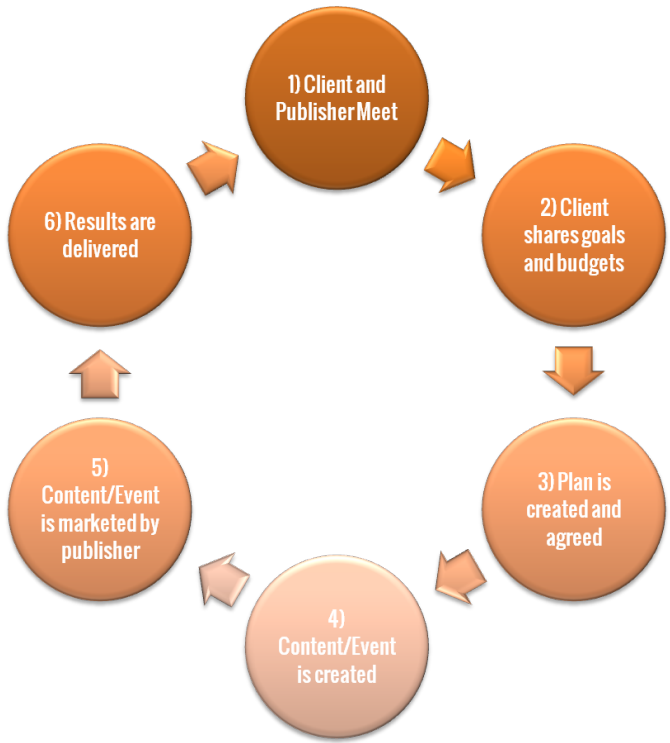
Magazine



Roundtables



Site & Newsletter



Events

OFF THE SHELF PRINT PACKAGES INCLUDE:

COSTS:

Page advertising - **£3.8k**

Page advertorial - **£5.2k**

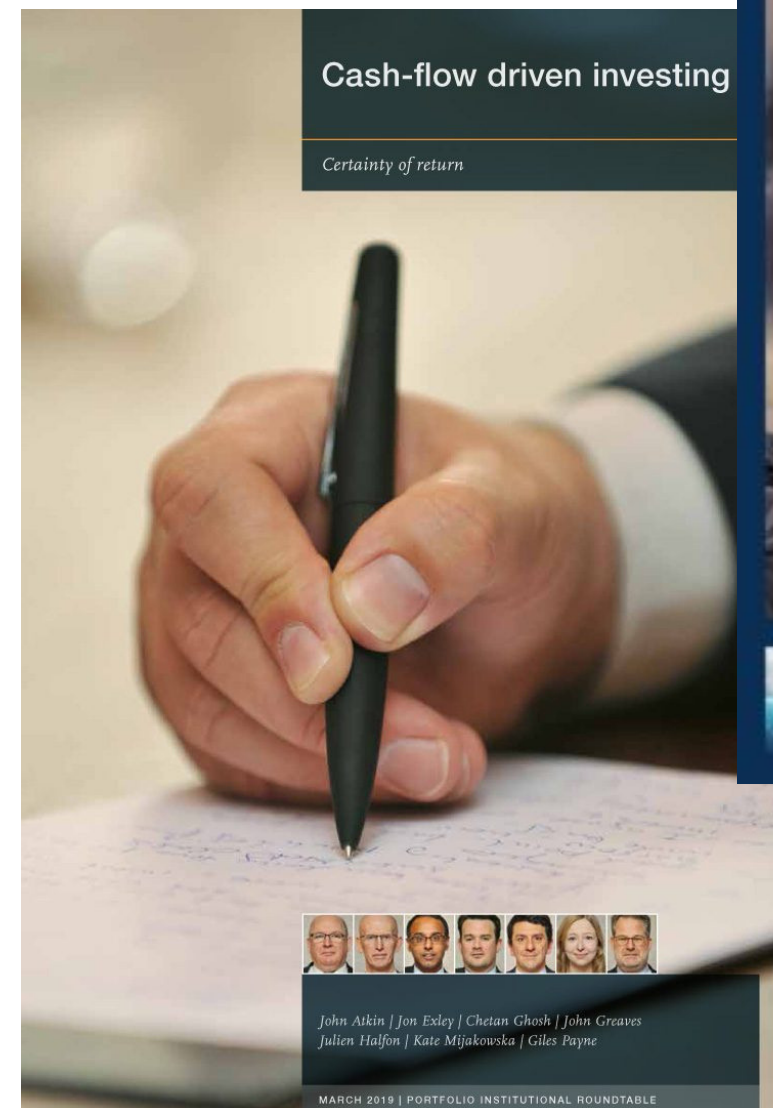
Page interview - **£6k**

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 2020:

December/January – Outlook 2020

February – Water

March – ESG ratings

April – Climate change: A smooth transition?

May – Cyber/ Data security

June – ESG fund performance

July – Emerging markets

September – Property and infrastructure

October – Executive remuneration

November – Corporate disclosure / transparency

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

Issue No. 80 | December-January 2019 | www.portfolio-institutional.co.uk | Independent analysis for institutional investors

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ESG 2.0

Going global
UK schemes on their
fondness for overseas
stocks

Liquid alternatives
Why are investors
shunning lower risk
assets?

Currency conundrum
Pick an active
currency fund or
embrace the risk?

Sponsored by

AON
Empower Results

CANDRIAM
INVESTMENT GROUP
A NEW YORK LIFE COMPANY

EatonVance
Investment Managers

Invesco

JUPITER
Asset Management

Legal & General
Investment Management

MSCI

NEWTON

ROBECO
The Investment Engineers

24 | portfolio institutional | December-January 2019 | Issue 80

News | ESG



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

Your ad here

YOUR LOGO

ESG, the next big Thing

Einführung in die Thematik. Der Inhalt wird in Bezug in Verbindung gesetzt mit Ihrem Unternehmen. Gezielten von der Redaktion von portfolio institutional, nach Vorgaben und Vorträgen aus Ihrem Unternehmen

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YOUR LOGO

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

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YOUR LOGO

Dieser Text stellt das Unternehmen und die Produkte vor

„The challenge is to encourage members to hang on for the long term, rather than becoming traders.“

Your ad here

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Portrait investor

Portrait investor

YOUR LOGO

Kurzportrait Unternehmen

„The challenge is to encourage members to hang on for the long term, rather than becoming traders.“

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YOUR LOGO

2020 ROUNDTABLES

Topic	Sits	Article and advert due	Published
ESG – Fixed Income	11/12/19	12/12/19	February
Fixed Income - Debt	14/01/20	15/01/20	March
ESG	19/03/20	20/03/20	April
CDI	22/04/20	23/04/20	May
Emerging Market Debt	13/05/20	14/05/20	June
DC	18/06/20	19/06/20	July
Alternatives	16/07/20	17/07/20	September
Responsible Investment	16/09/20	17/09/20	October
Multi- Asset	22/10/20	23/10/20	November

★ 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



LATEST ARTICLES



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AVERAGE DIGITAL STATS BY CONTENT:

WEBSITE VIEWS:

Monthly: 7900 / Unique: 4200

Roundtables: 1360

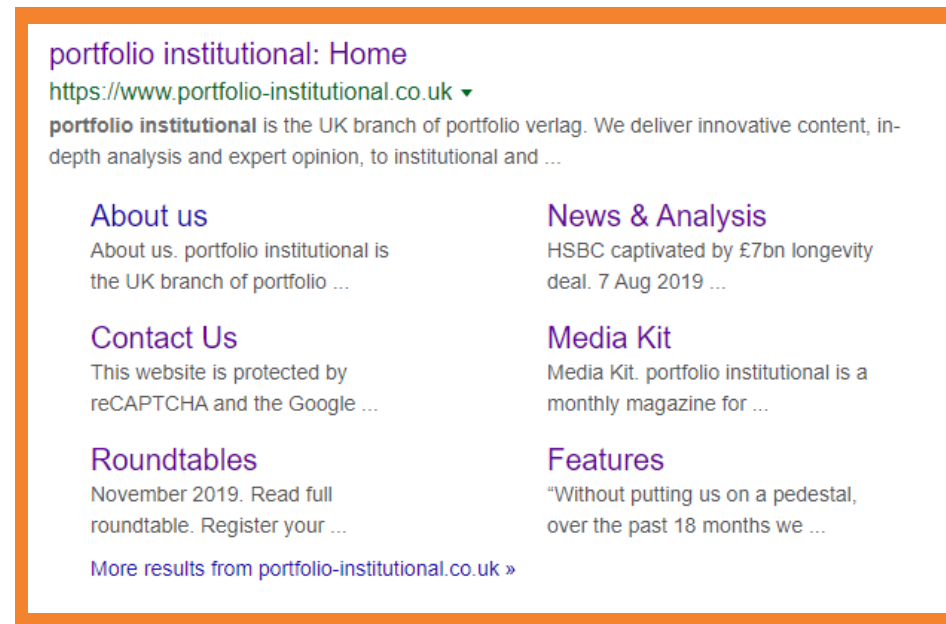
Portfolio insight: 200

ESG feature: 200

Sponsored article: 85

Billboard: Dependent on duration of ad

MPU - Dependent on duration of ad



SOCIAL MEDIA ENGAGEMENT:

Impressions [clicks]

Roundtables: 1105 [47]

Portfolio insight: 945 [35]

ESG feature: 1020 [37]

Sponsored article: 450 [13]



NEWSLETTER [WEEKLY]:

Opens: 613 / Average total clicks: 77

Roundtables: 35

Portfolio insight: 20

ESG feature: 20

Sponsored content: 12

Billboard: 5

Successful deliveries	2,802	99.7%	Clicks per unique opens	12.6%
Total opens	779		Total clicks	81
Last opened	9/12/19 9:35AM		Last clicked	27/9/19 12:03PM
Forwarded	0		Abuse reports	0

2019 PLAN

NOVEMBER- EXTRA CIRCULATION AT THE LGPS ASSET ALLOCATION FORUM:

- **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:

- Institutional Insight
- Expert Panel - ESG
- Local Authority Pooling Feature
- Northern pool interview
- Feature one - **ESG outlook**
- Feature two - **Longevity/De-Risking**
- Feature three - **Pooling**
- Feature four - TBC

2020 PLAN

FEBRUARY:

- **Roundtable - ESG in Fixed Income**
- Institutional Insight
- Expert Panel - ESG
- Local Authority Pooling Feature
- Pension Fund Interview
- Feature one - **Water**
- Feature two - **Property**
- Feature three - **Questions to ask an Asset Manager**
- Feature four - **Investing in AI & Automation**

MARCH - EXTRA CIRCULATION AT THE PLSA:

- **Roundtable - Fixed Income**
- Institutional Insight
- Expert Panel - ESG
- Local Authority Pooling Feature
- Pension Fund Interview
- Feature one - **ESG Ratings**
- Feature two - **Currencies**
- Feature three - **CDI**
- Feature four - **Psychology of Investing**

APRIL:

- **Roundtable - ESG**
- Institutional Insight
- Expert Panel - ESG
- Local Authority Pooling Feature
- Pension Fund Interview
- Feature one - **The Low Carbon Transition**
- Feature two - **Emerging Market Debt**
- Feature three - **Investing in Britain**
- Feature four - **Liquid Alternatives**

2020 PLAN

MAY:

- **Roundtable - CDI**
- Institutional Insight
- Expert Panel - ESG
- Local Authority Pooling Feature

- Pension Fund Interview
- Feature one - **Data security/ Cybercrime**
- Feature two - **Defined Contribution**
- Feature three - **Managing Volatility**
- Feature four - **Charities & Endowments**

JUNE:

- **Roundtable - EM Debt**
- Institutional Insight
- Expert Panel - ESG
- Local Authority Pooling Feature

- Pension Fund Interview
- Feature one - **ESG fund performance**
- Feature two - **Smart Beta**
- Feature three - **Real Assets**
- Feature four - **Fixed Income**

JULY:

- **Roundtable - Defined Contribution**
- Institutional Insight
- Expert Panel - ESG
- Local Authority Pooling Feature

- Pension Fund Interview
- Feature one - **Emerging Markets**
- Feature two - **Private Debt**
- Feature three - **Fiduciary Management**
- Feature four - **Global Downturn; Where To Invest**

2020 PLAN

SEPTEMBER:

- **Roundtable - Alternatives**
- Institutional Insight
- Expert Panel - ESG
- Local Authority Pooling Feature
- Pension Fund Interview
- Feature one - **ESG in Property & Infrastructure**
- Feature two - **Multi Asset**
- Feature three - **ETFs**
- Feature four - **Consolidation**

OCTOBER - EXTRA CIRCULATION AT THE PLSA:

- **Roundtable - Responsible Investing**
- Institutional Insight
- Expert Panel - ESG
- Local Authority Pooling Feature
- Pension Fund Interview
- Feature one - **Executive Pay**
- Feature two - **Illiquidity**
- Feature three - **Equities**
- Feature four - **How To Pick An Asset Manager**

NOVEMBER:

- **Roundtable - Multi-Asset**
- Institutional Insight
- Expert Panel - ESG
- Local Authority Pooling Feature
- Pension Fund Interview
- Feature one - **Corporate Disclosure/Transparency**
- Feature two - **Gold**
- Feature three - **Distressed Debt**
- Feature four - **Investing in Healthcare**

2020 PLAN

DECEMBER / JANUARY :

- **Roundtable** - TBC
- Institutional Insight
- Expert Panel - ESG
- Local Authority Pooling Feature
- Pension Fund Interview
- Feature one - **ESG outlook**
- Feature two - **Infrastructure**
- Feature three - **Hedge Funds**
- Feature four - **Pooling**

PORTFOLIO INSTITUTIONAL PARTNERSHIPS



Association of Member Nominated Trustees

Room 151

Local Government Treasury, Technical & Strategic Finance

Responsible Asset Owners

Global Symposium 

Thank You

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