PORTFOLIO INSTITUTIONAL

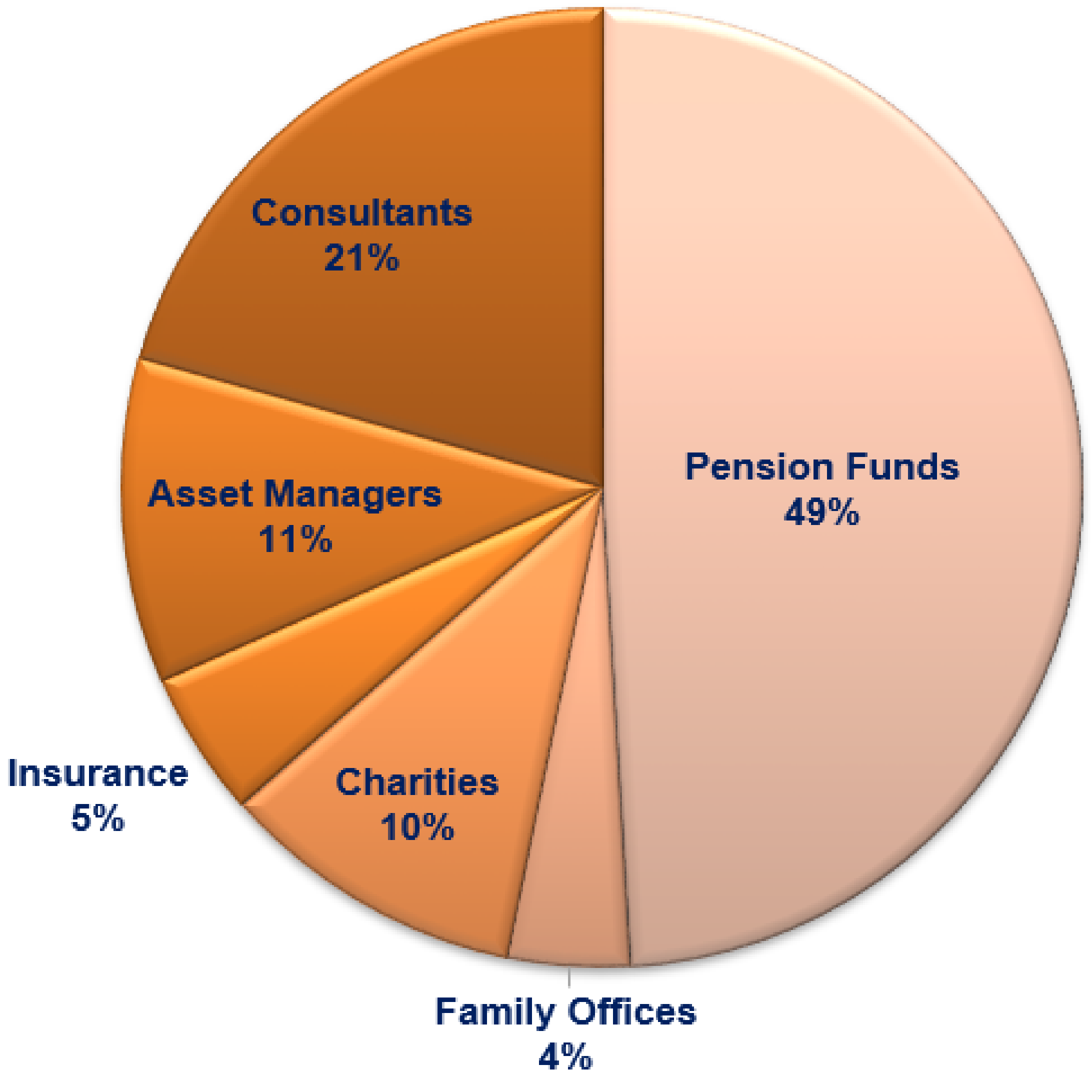
portfolio institutional

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.

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:

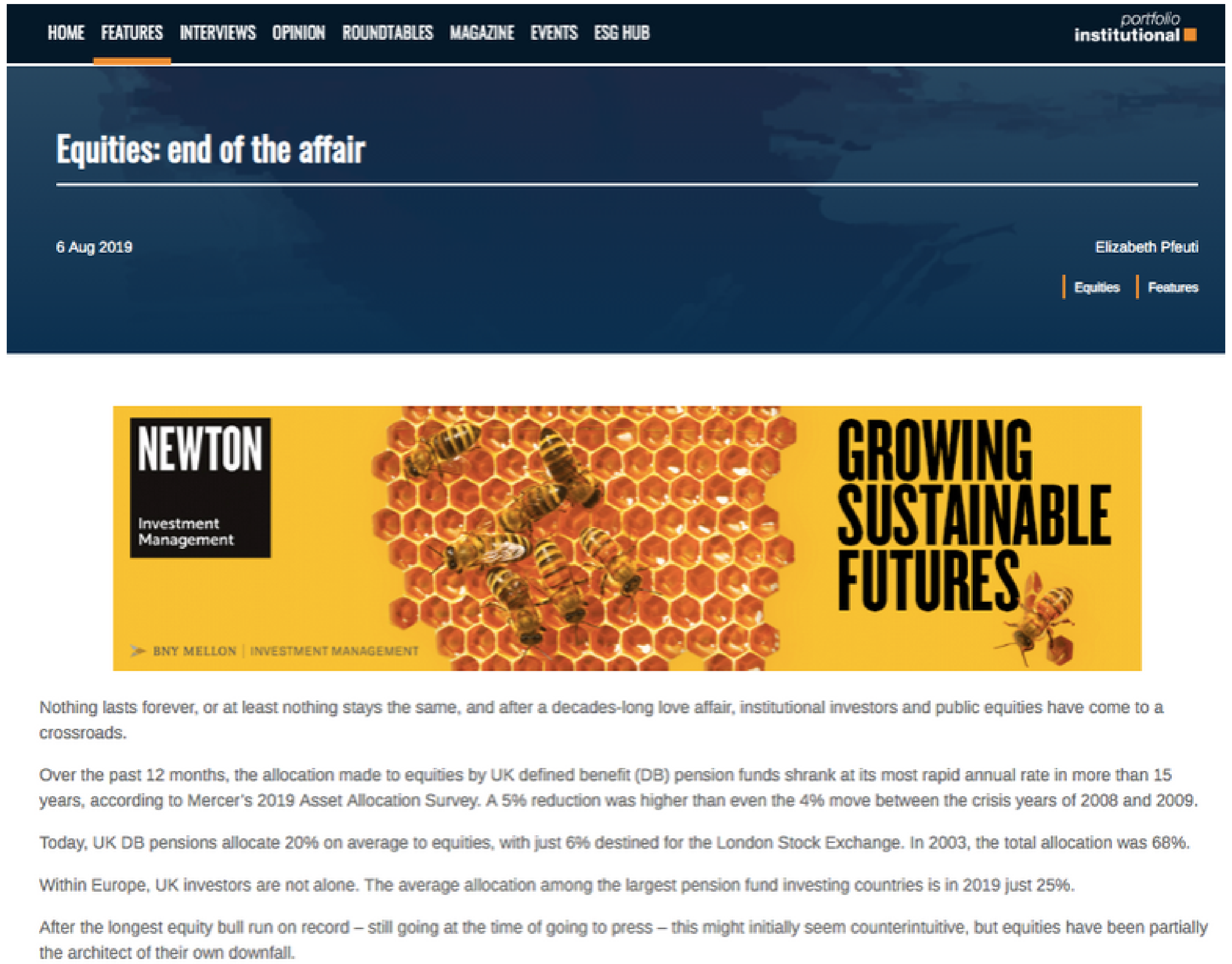
- Pension manager
- Head of pensions
- Pensions director

Trustees:

- Independent trustees
- Trustee director
- Chair of trustees

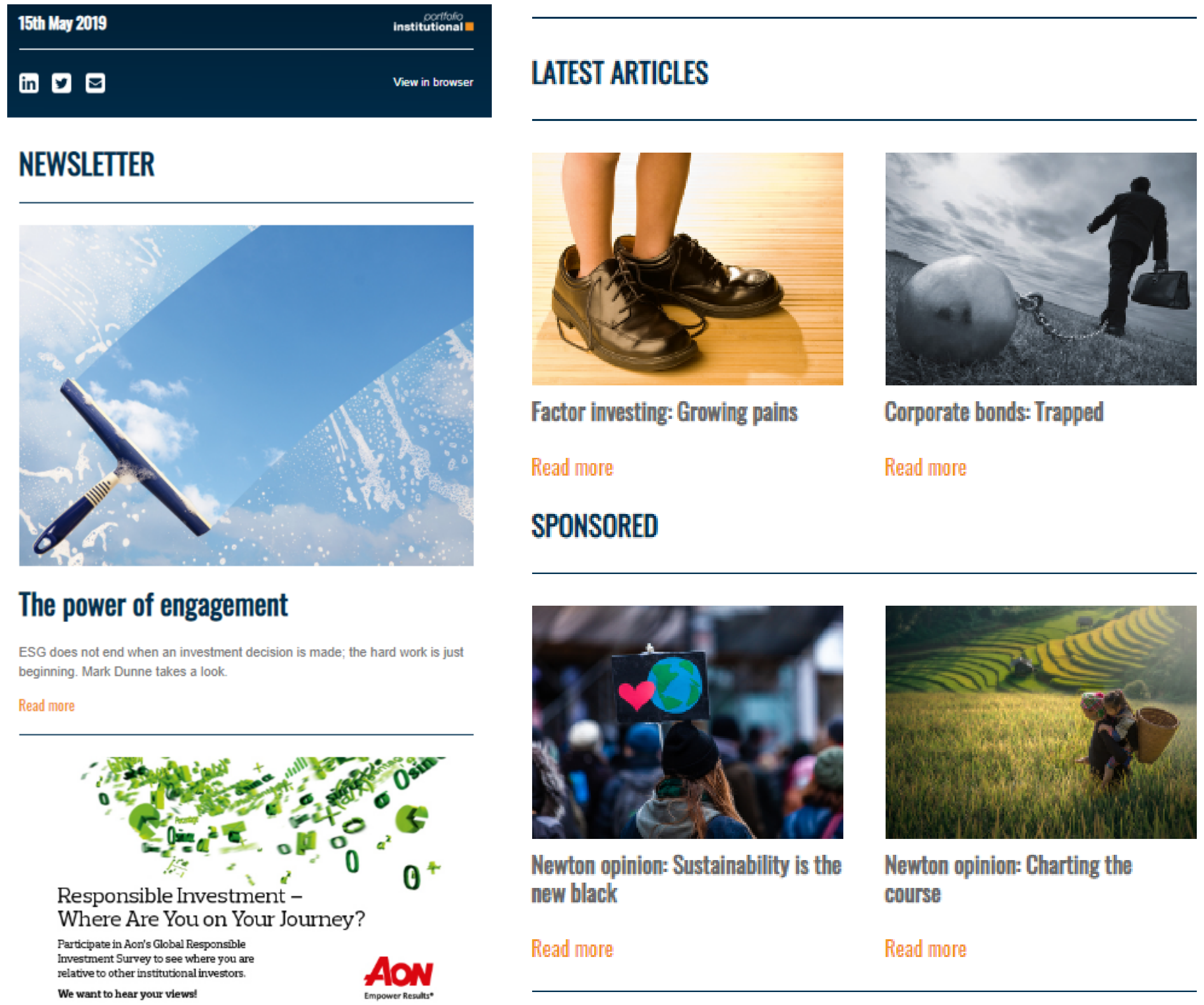
STATISTICS

DIGITAL STATS:



4,200 monthly unique users
7,900 monthly page impressions

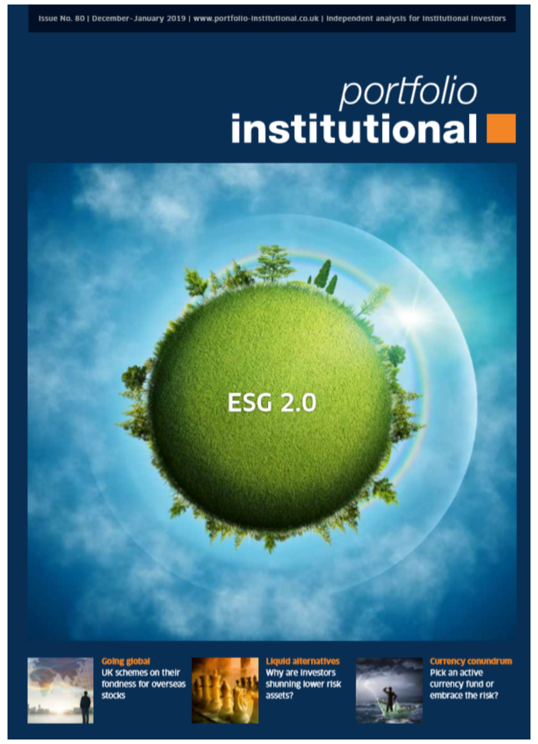
NEWSLETTER STATS:



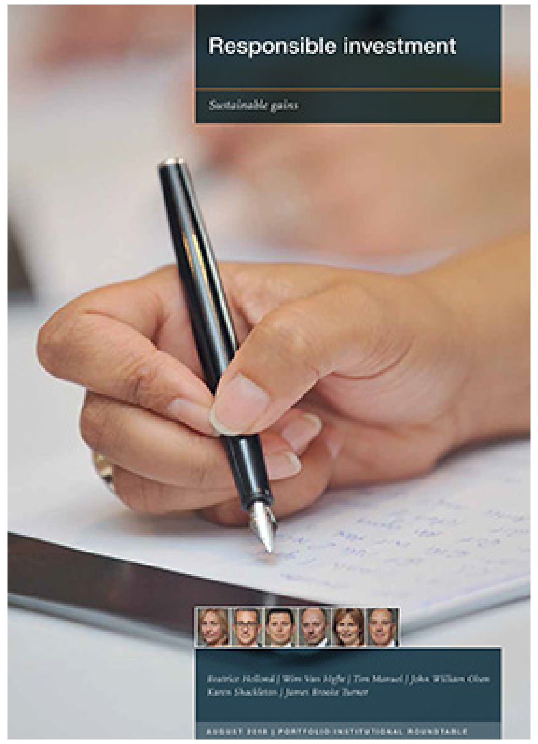
4,000 opted in subscribers
15% click through rate

WHAT WE OFFER

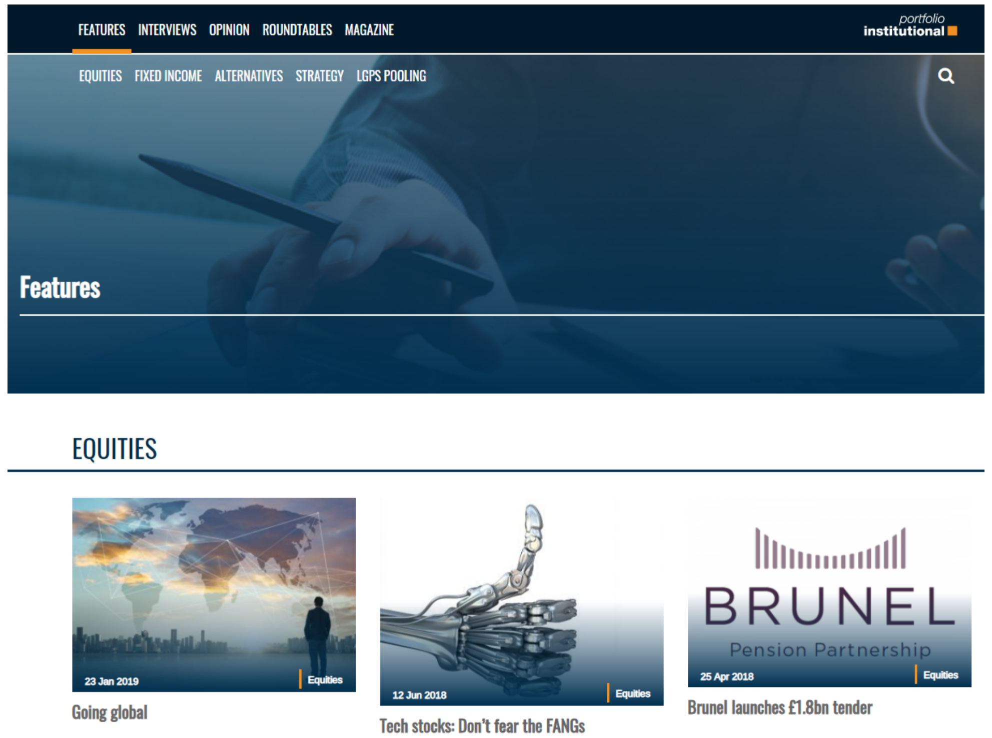
The content is distributed to our audience via a print product and digitally via the site and newsletter



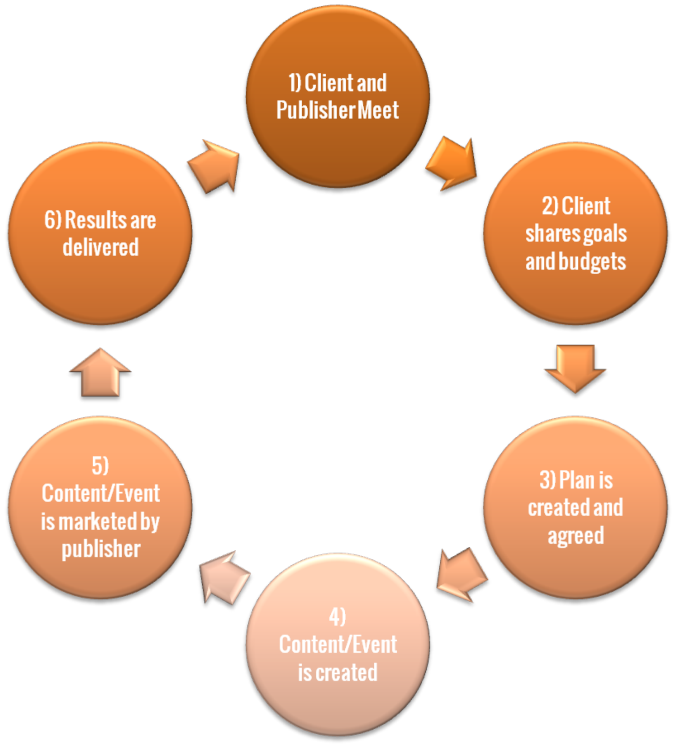
Magazine



Roundtables



Site & Newsletter



Events

OFF THE SHELF PRINT PACKAGES INCLUDE:

COSTS:

Page advertising - **£3.8k**

Page advertorial - **£5.2k**

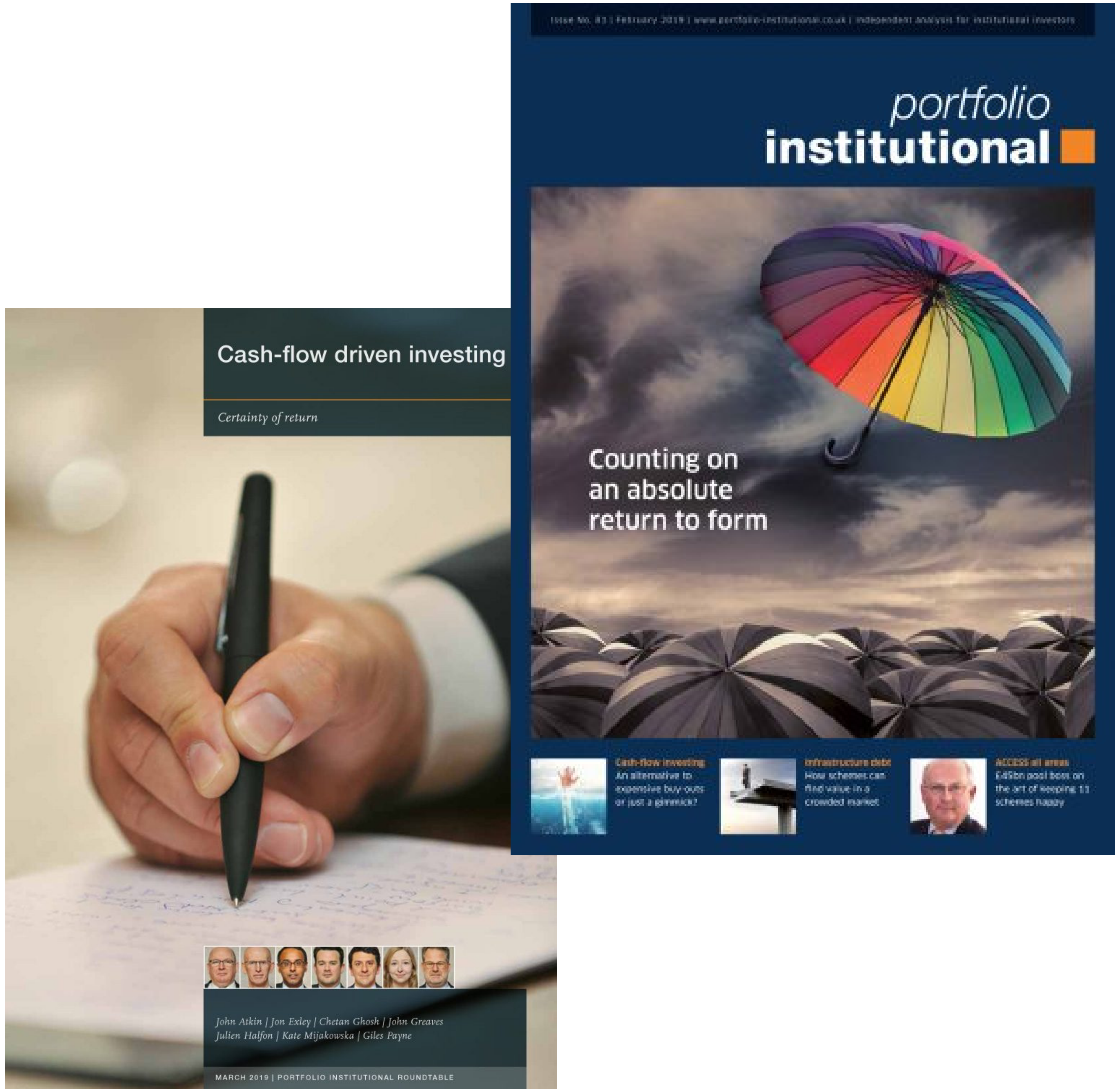
Page interview - **£6k**

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 CLUB

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 renumeration

November – Corporate disclosure / transparency

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

ESG club members receive:

Entrance to portfolio's ESG club meeting

Coverage in portfolio's magazine

Access to supply monthly content to the online ESG hub

Appear on the ESG directory

Social media promotion of your ESG coverage

Newsletter push of your ESG coverage

Standout quotes in magazine and social media

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

2020 ROUNDTABLES

Topic	Sits	Article and advert due	Published
Fixed Income – Private debt ★	14/01/20	15/01/20	March
Alternatives	05/02/20	06/02/20	April
ESG	19/03/20	20/03/20	May
CDI	02/04/20	03/04/20	June
DC	13/05/20	14/05/20	July
Factor Based investing	16/07/20	17/07/20	September
Multi-Asset	13/08/20	14/08/20	October
Responsible investing	16/09/20	17/09/20	November
EMD	22/10/20	23/10/20	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**

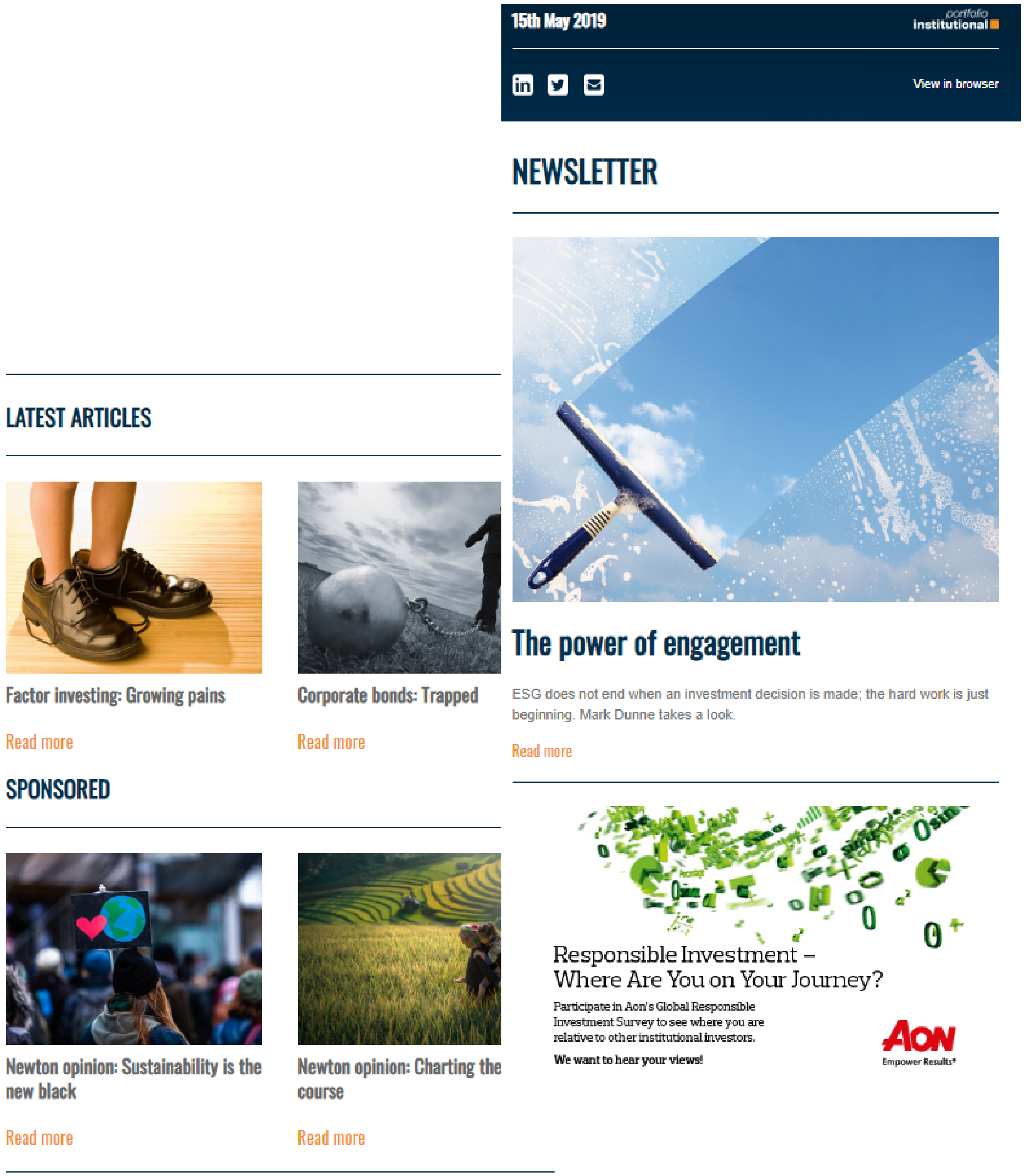
Double MPU (300 x 600) - **£250 p/week**

Please contact for special offerings e.g. site takeover

NEWSLETTER:

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

Text ad - **£350 p/week**



*Portfolio offer volume discounts and value added for multiple bookings

AVERAGE DIGITAL STATS BY CONTENT:

WEBSITE VIEWS:

Monthly: 7900 / Unique: 4200

Roundtables: 1360

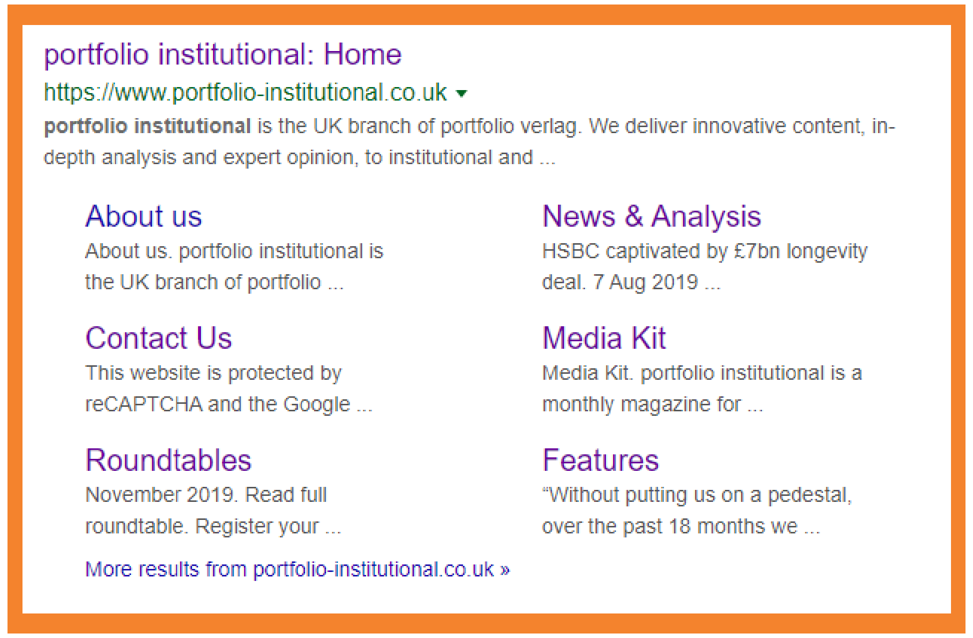
Portfolio insight: 200

ESG feature: 200

Sponsored article: 85

Billboard: Dependent on duration of ad

MPU - Dependendt on duration of ad



NEWSLETTER [WEEKLY]:

Opens: 613 / Average total clicks: 77

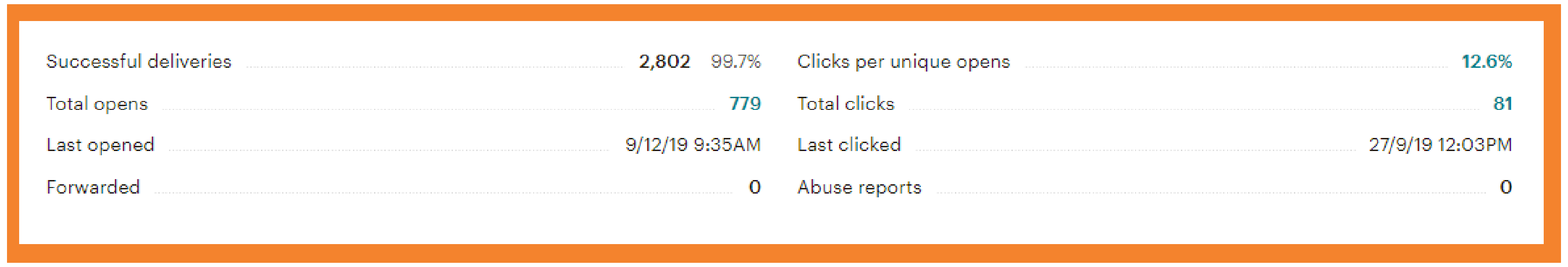
Roundtables: 35

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

SOCIAL MEDIA ENGAGEMENT:

Impressions [clicks]

Roundtables: 1105 [47]

Portfolio insight: 945 [35]

ESG feature: 1020 [37]

Sponsored article: 450 [13]

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

PENSIONS AND LIFETIME SAVINGS ASSOCIATION

PENSIONS POLICY INSTITUTE
PPI

amnt
Association of Member Nominated Trustees

Room151
Local Government Treasury, Technical & Strategic Finance

Responsible Asset Owners
Global Symposium

Thank You

For more information please contact:

Clarissa Huber - Head of Sales

C.huber@portfolio-institutional.co.uk

DL: 0207 822 8522

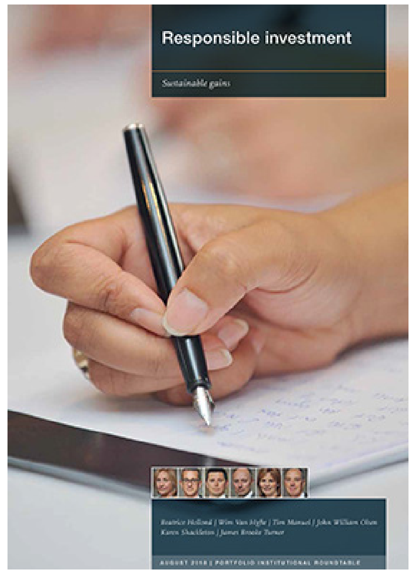
Will Brown - Sales and Marketing Executive

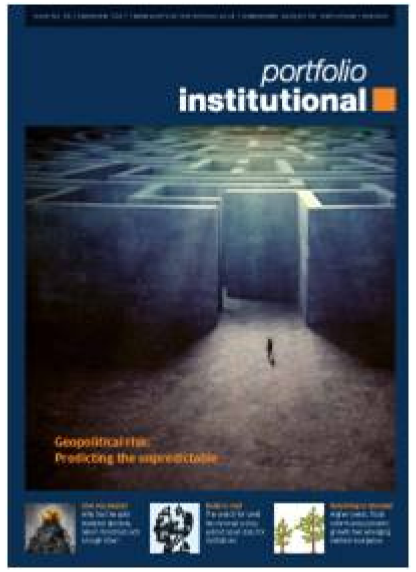
w.brown@portfolio-institutional.co.uk

John Waterson - Publisher

j.waterson@portfolio-institutional.co.uk

Tel: 0207 822 8522





portfolio
institutional