

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

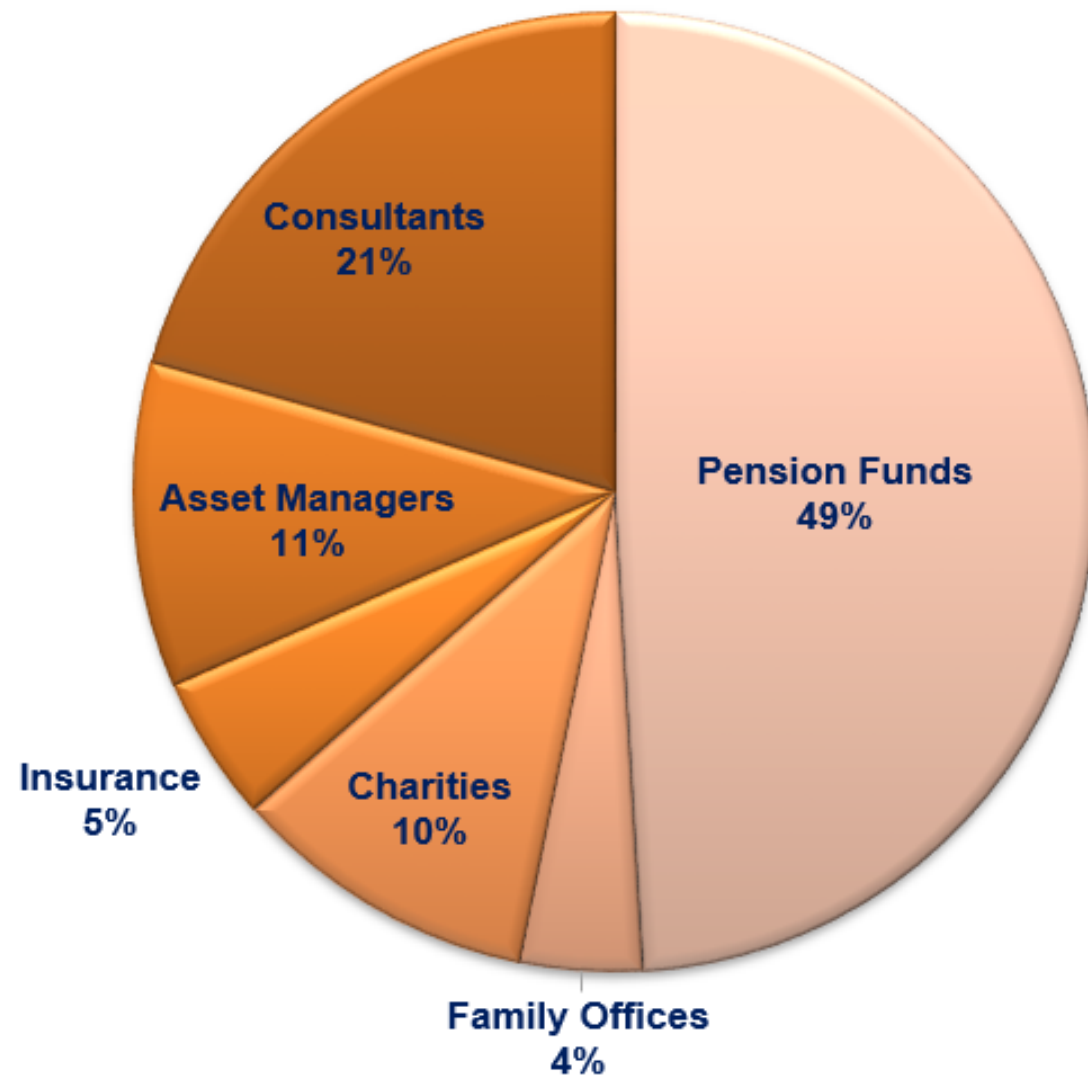


ESG: What lies beneath?



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:

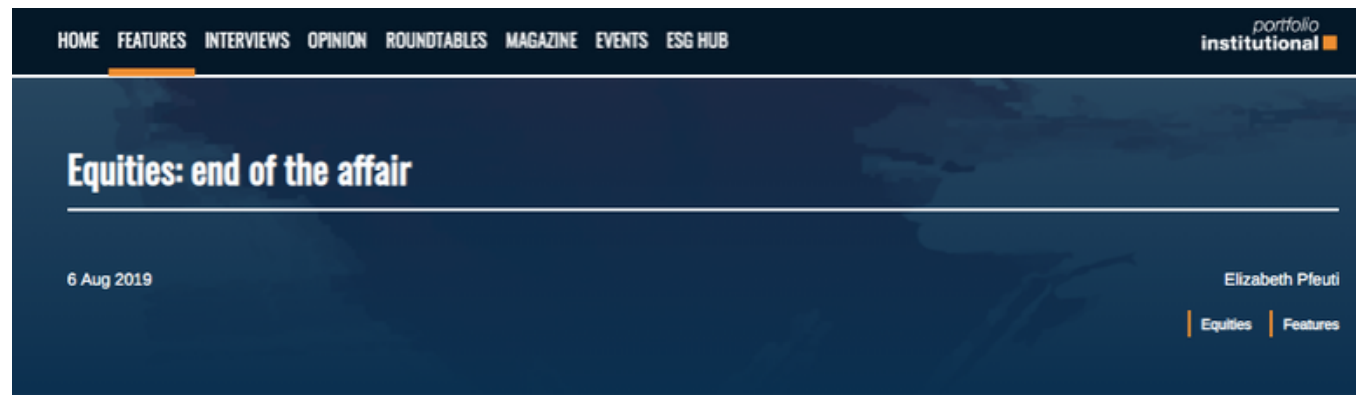
- Pension manager
- Head of pensions
- Pensions director

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

[Read more](#)



Corporate bonds: Trapped

[Read more](#)

SPONSORED



Newton opinion: Sustainability is the new black

[Read more](#)



Newton opinion: Charting the course

[Read more](#)

4,000 opted in subscribers
15% click through rate

WHAT WE OFFER

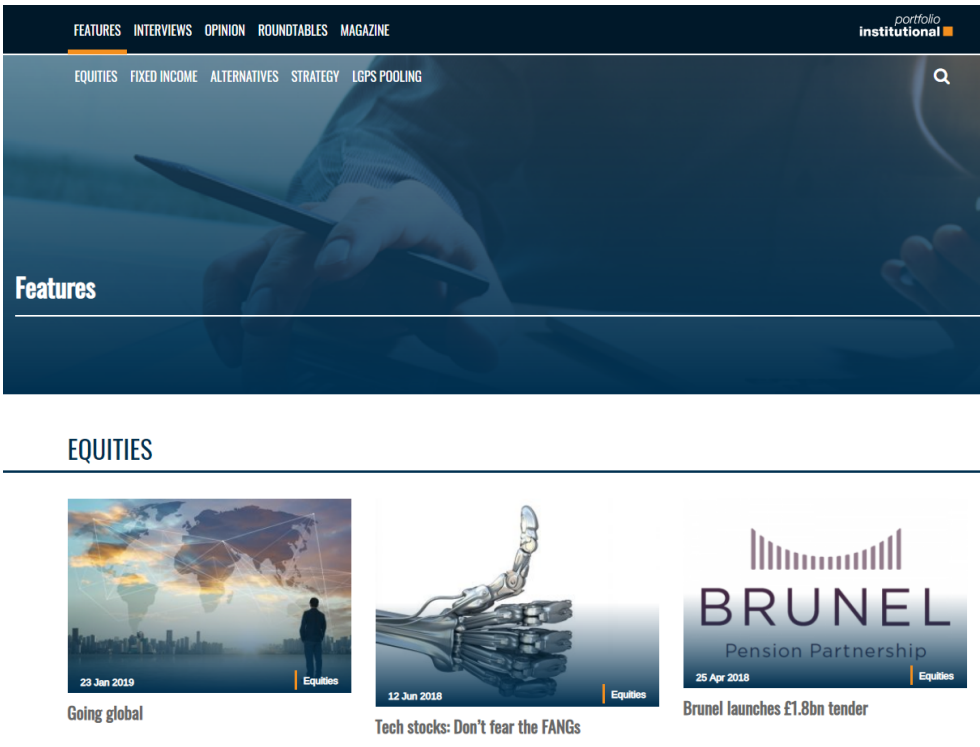
The content is distributed to our audience via a print product and digitally via the site and newsletter



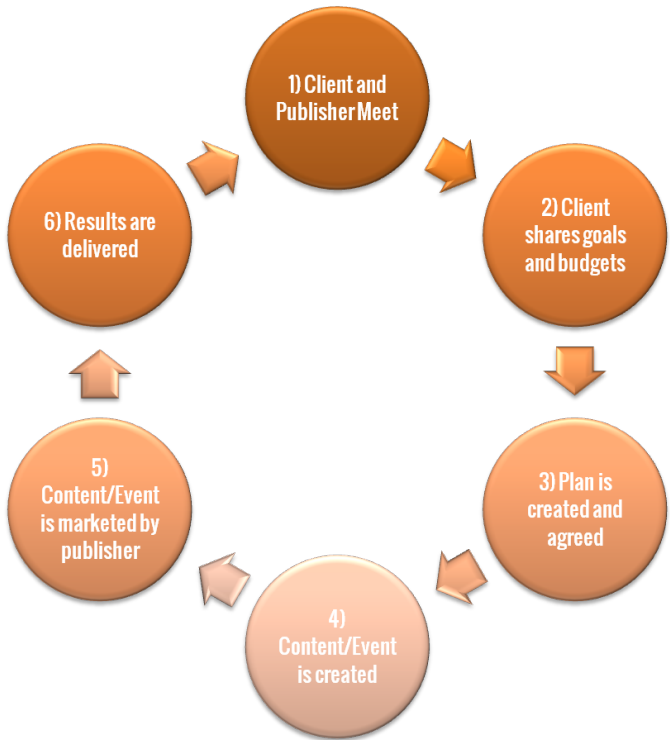
Magazine



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 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 remuneration

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



ESG, the next big Thing

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

Portion Redacteur
L'objectif est de présenter les idées principales de votre entreprise au grand public. Ce document sert de référence pour vos investisseurs et clients. Il est essentiel de bien structurer les informations et de rendre le contenu accessible et compréhensible pour tous.

Auf dieser Seite ein Interview, geführt von der Redaktion.

Mit einem Investor nach ihrer Wahl

The range of diversified growth funds (DCGFs) is varied as the investment strategies they offer. From absolute returns through to dynamic and strategic funds. The one thing they have in common is that they engage equity-like returns with lower exposure to volatility. This will appeal to pension schemes facing the effects that capital will have on inflating equity and bond markets.

"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."

Jonathan Reynolds, Capital Central Pension Trustees

These are two key factors behind this trend. The first is the introduction of the DC charge cap, which has caused a growing focus on fixed rate investing schemes. The second is the introduction of asset contributions, which has dramatically increased the assets of DC schemes. Demand for DCFs from DC funds is going to accelerate over the next few years as the UK continues to see a rise in new private employer contributions and as the UK continues to see a rise in new private employer contributions and as the UK continues to see a rise in new private employer contributions...



Dieser Text stellt das Unternehmen und die Produkte vor

The range of diversified growth funds (DCGFs) is varied as the investment strategies they offer. From absolute returns through to dynamic and strategic funds. The one thing they have in common is that they engage equity-like returns with lower exposure to volatility. This will appeal to pension schemes facing the effects that capital will have on inflating equity and bond markets.

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

Alan Pickering, BESTInvestors

will they perform in volatile periods like at those witnessed at the beginning of the year? Since the 2007 financial crisis, institutional investors have warmed to DCFs with its down ten months since funds increasing its yield between 2009 and 2011, according to Henderson Global Investors.



Portrait investor

L'objectif est de présenter les idées principales de votre entreprise au grand public. Ce document sert de référence pour vos investisseurs et clients. Il est essentiel de bien structurer les informations et de rendre le contenu accessible et compréhensible pour tous.

YOUR LOGO



INSTITUTIONAL INSIGHT

As a result of the 2007 financial crisis, institutional investors have warmed to DCFs with its down ten months since funds increasing its yield between 2009 and 2011, according to Henderson Global Investors.

Portion Redacteur
L'objectif est de présenter les idées principales de votre entreprise au grand public. Ce document sert de référence pour vos investisseurs et clients. Il est essentiel de bien structurer les informations et de rendre le contenu accessible et compréhensible pour tous.

YOUR LOGO

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**



NEWSLETTER



LATEST ARTICLES



Factor investing: Growing pains

[Read more](#)



Corporate bonds: Trapped

[Read more](#)

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](#)

SPONSORED



Newton opinion: Sustainability is the new black

[Read more](#)



Newton opinion: Charting the course

[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!

AON
Empower Results*

*Portfolio offer volume discounts and value added for multiple bookings

AVERAGE DIGITAL STATS BY CONTENT:

WEBSITE VIEWS:

Monthly: 7900 / Unique: 4200

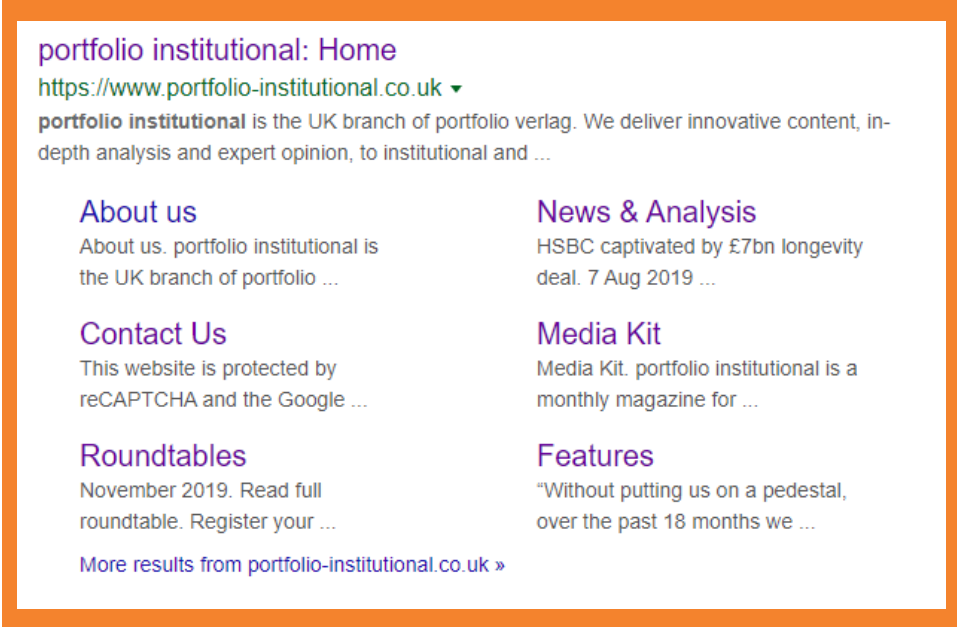
Roundtables: 1360

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



Association of Member Nominated Trustees

Room 151

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

