

# Unlocking a smoother, superior performance edge for clients



**For over 25 years, Alexforbes has emerged as the premier multi-manager and provider of investment advice and solutions.**

The experience and success gained from our multi-manager origins has allowed us to unlock a comprehensive suite of solutions-based investment propositions for clients, at better value.



## Ultimately, we aim to do three things exceptionally well:

- 1 Use our industry-leading insights to find solid investment opportunities.
- 2 Find the most talented asset manager strategies by distilling the good ones from the bad ones.
- 3 Skilfully blend their complementary strengths to provide stability and growth potential to investments.

**We believe that by focusing on these three key areas, we are firmly placed to deliver performance that is:**

➤ **Consistent.**

➤ **Competitive.**

➤ **Superior.**

History has shown that the best performing strategy or asset manager today can be the worst performing strategy or asset manager tomorrow and vice versa. For us, being the best performing solution today is not as important as performing consistently well over time. We believe that great investment outcomes are often just the culmination of good results for a long period of time.

This winning approach has persistently helped us deliver consistent, competitive return streams that compound to superior investment performance over time.



### > Consistent returns

Achieving sustained and predictable investment performance over time.



We invest in asset managers with tried and tested investment philosophies who can produce repeatable and dependable outcomes to deliver smoother and **consistent** investment performance, across all market conditions.

### > Competitive returns

Returns that not only match, but often surpass, the average returns observed in the broader market.



We flex to swiftly implement tactical views and adapt investment line-ups in response to changing markets. Knowing which investments will excel and when, can ultimately provide a **competitive** performance edge for our clients.

### > Superior performance

It is not enough to simply generate impressive results. It is the ability to consistently achieve competitive results, in challenging market conditions that scales the performance tables over time.



We adopt a disciplined and informed approach to manager selection and portfolio construction. In our experience, finding the most talented asset managers and blending them in a complementary manner is the key to unlocking **superior** performance in a portfolio solution.

# How do we achieve this?

## Purposeful diversification

Our multi-manager approach purposefully spreads your savings and investments beyond different asset managers, investment types and strategies. We call this purposeful diversification – a sophisticated means of ensuring that no single investment or event will ever dominate the fortunes of your savings and investments.

## Purposeful diversification in action

Our investment solutions are built using a defined process, encompassing three steps:

1

### Asset allocation

#### Multi-investment solutions.

Well-diversified investments generally produce more consistent return streams.



#### We ask:

Which are preferred globally? Which are ideal in different market cycles? Which are aligned to particular objectives?

Our solutions invest in a broad mix of investments, promoting exposure to different sources of return – ensuring consistency of investment performance.

#### 1. Asset allocation



Multi-investments

Reliable returns



2

### Strategy selection

#### Multi-strategy solutions.

Different investment strategies (ways or methods of investing) excel at different times as markets move between cycles.



#### We ask:

Which are more likely to provide outperformance over time? Which are more predictable? Which complement each other?

Our solutions make intelligent use of a blend of investment strategies that work together – ensuring competitive investment performance.

#### 2. Strategy selection



Multi-strategy

Differentiated returns



3

### Manager selection

#### Multi-manager solutions.

Asset managers have different views and behave differently, all moving through different periods of outperformance and underperformance over time.



#### We ask:

Which will capture upside in bull markets? Which will protect in bear markets? Which will deliver alpha?

Our solutions allocate investments to a blend of asset managers that are best placed at implementing the investment strategies we want – ensuring superior investment performance.

#### 3. Manager selection



Multi-manager

Smoother returns





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In a fast-paced world, there is no shortage of new ideas or better ways to invest. We pride ourselves on offering local expertise with a global outlook. This helps our clients access what we believe to be the best-in-class and most relevant investment propositions, wherever they exist in the world.

We have stayed true to this ethos, leveraging our deep-rooted multi-manager knowledge and skill sets to not only be innovative in our approach to investment management but also in the way that clients' best interests can be considered and met.

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