

**Wealth & Asset**  
Management  
**AWARDS 2025**

**Winners**  
**Brochure**

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innovation in the wealth and  
asset management industry*

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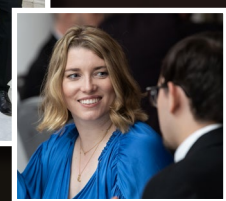
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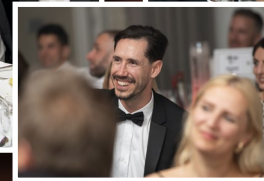
  
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# Wealth & Asset Management AWARDS 2025



# Wealth & Asset Management AWARDS 2025



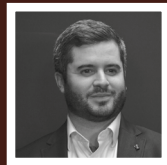
# Contents

|                  |    |
|------------------|----|
| Welcome          | p5 |
| Winners' Gallery | p6 |

## Highlighted winners

|   |     |
|---|-----|
| Best ISA Provider of the Year               | p8  |
| ESG Initiative of the Year                  | p9  |
| Multi-Asset Manager of the Year             | p11 |
| Private Equity Manager of the Year          | p13 |
| Best Digital Innovator in Wealth Management | p15 |
| Equities Manager of the Year                | p17 |

## 2025 Judging Panel



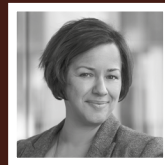
**Chair of judges:**  
**Adam Cadle**  
Editor  
Corporate Finance  
News, Insurance  
Asset Management  
and MoneyAge



**Annabel  
Brodie-Smith**  
Communications  
Director  
Association of  
Investment  
Companies (AIC)



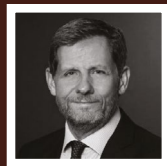
**David Butcher**  
Founder & Director  
Communications and  
Content



**Bella  
Caridade-Ferreira**  
CEO  
Fundscape



**Benjamin Dyson**  
Principal Wealth  
Strategist  
Foresight



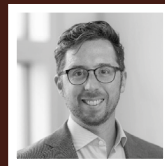
**Edward Gordon Hall**  
CEO  
Druces LLP



**Jane Hodges**  
Managing Director  
Money Honey  
Financial Planning



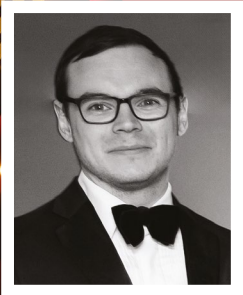
**Kate Monserrate**  
Director  
Simplify Consulting



**Reuben Overmark**  
Senior Policy Adviser,  
Retail Markets  
The Investment  
Association



**Charles Sunnucks**  
Fund Manager  
Oldfield Partners



**W**elcome to the Wealth and Asset Management Awards 2025 winners brochure, where we recognise and celebrate success in the wealth and asset management industries.

In a year shaped by uncertainty and volatility, the wealth and asset management sectors have had to adapt and innovate to navigate these choppy waters. Investment managers have been kept on their toes by developing investment trends and geo-political events, as well as regulatory changes and the adoption of new technologies.

Across the financial services, wealth and investment professionals have demonstrated they are up to the task, ensuring their clients receive the best, from advisory and administrative services to innovative products and strategies.

The Wealth and Asset Management Awards 2025 were held at the Waldorf Hilton, London, to showcase the highest level wealth and asset managers, financial advisers, and other financial services professionals from across the investment landscape. The awards ceremony was hosted by comedian Rhys James, who helped present the trophies.

Congratulations to all the winners and well done to all the firms who were shortlisted on the night. A huge thank you to the judging panel for their time and expertise. Many thanks also to our sponsor, threesixty, and to all those who entered and attended the awards. We look forward to welcoming you again in 2026.

**Jack Gray, Editor  
Wealth Investment News**

# Winner's Gallery



**ASSET MANAGER OF THE  
YEAR (over £25bn AUM)**  
**Santander Asset  
Management**



**MULTI ASSET MANAGER  
OF THE YEAR**  
**Copia Capital**



**REAL ASSETS MANAGER  
OF THE YEAR**  
**Patron Capital**



**ASSET MANAGER OF THE  
YEAR (under £25bn AUM)**  
**Bordier UK**



**ALTERNATIVES  
INVESTMENT PROVIDER  
OF THE YEAR**  
**WTW**



**EQUITIES MANAGER  
OF THE YEAR**  
**Fisher Investments  
Europe**



**PRIVATE EQUITY  
MANAGER OF THE YEAR**  
**Neuberger Berman**



**FIXED INCOME  
MANAGER OF THE YEAR**  
**Man Group**



**EMERGING MARKETS  
MANAGER OF THE YEAR**  
**Fiera Capital**



**ACTIVE MANAGER  
OF THE YEAR**  
**Morningstar  
Wealth**



**FIDUCIARY MANAGER  
OF THE YEAR**  
**SECOR**

**Wealth & Asset  
Management  
AWARDS 2025**  
**WINNER**

**PASSIVE MANAGER  
OF THE YEAR**  
**Kraneshares**

# Wealth & Asset Management AWARDS 2025



WEALTH MANAGEMENT COMPANY OF THE YEAR (over £25bn AUM)  
**True Potential Wealth Management**



FINANCIAL ADVISORY FIRM OF THE YEAR  
**Rowley Turton**



WEALTH MANAGEMENT COMPANY OF THE YEAR (under £25bn AUM)  
**Succession Wealth**



MARKETING CAMPAIGN OF THE YEAR  
**Hargreaves Lansdown**



BEST ISA PROVIDER OF THE YEAR  
**Wesleyan Assurance Society**



INNOVATION OF THE YEAR  
**P1 Platform**



BEST DIGITAL INNOVATOR IN WEALTH MANAGEMENT  
**Aventur**



ESG INITIATIVE OF THE YEAR  
*sponsored by threesixty*  
**AXA IM Alts**



STOCKBROKER OF THE YEAR  
**Hargreaves Lansdown**



TECHNOLOGY FIRM OF THE YEAR  
**iCapital**



WEALTHTECH FIRM OF THE YEAR  
**Titanbay**



OPERATIONS CONSULTANCY OF THE YEAR  
**Simplybiz**



TECHNOLOGY FIRM OF THE YEAR (Platform)  
**Auquan**

WINNER

## Best ISA Provider of the Year - Wesleyan Assurance Society



### WESLEYAN

#### Judge's comment

*"We were impressed by Wesleyan Assurance Society's ISA offering, particularly for the financial and non-financial benefits it provides to its clients."*

Wesleyan Assurance Society has proved itself the deserved winner of the Best ISA Provider of the Year Award with its market-leading product offerings and ability to meet clients' needs. Congratulations to Wesleyan Assurance Society, which impressed the judges with its ISA offering, particularly for the financial and non-financial benefits it provides to its clients.

The Wesleyan With Profits Fund holds more than £4 billion of customer investments, as at November 2024, across a diverse mix of asset classes. Boasting a strong long-term performance track record, the fund has delivered healthy financial returns for the firm's With Profits ISA plan holders, which was highly commended by the judges.

Alongside these strong returns, Wesleyan With Profits ISA customers also benefit from incentives and mutual year-round benefits, including a Mutual Bonus payment (when applicable), portal enhancements, insurance discounts, and a member reward programme, demonstrating Wesleyan Assurance Society's commitment to providing the best service to its clients.

In alignment with its core 'buy and hold' strategy, Wesleyan Assurance Society's fund managers look to keep the fund portfolio turnover low, favouring equities over the longer term to withstand market volatility.

The judges were also impressed with the property element of its With Profits Fund, which holds more than £450 million of commercial

property assets across the UK. They praised the fact that Wesleyan Assurance Society directly owns 100 per cent of the properties in its portfolio, which maximises the opportunity for stronger long-term customer returns for its With Profits ISA plan holders, and their ESG credentials, with all properties having an Energy Performance Certificate of 'D' or above.

Wesleyan Assurance Society's With Profits Fund also delivers several non-financial benefits, showcasing the firm's commitment to nurturing people, communities, and the planet. Through its commercial property portfolio, Wesleyan Assurance Society has been involved in several initiatives as part of its commitment to ESG factors, including charity donations and supporting the green transition.

Proving itself to be a responsible investor, Wesleyan Assurance Society's With Profit Fund, as with all its managed funds, is aligned to its Sustainable Investing Policy. Its Sustainable Investment Team works alongside the firm's overall Investments Department to assess its funds, holdings, and management decisions through a sustainability lens, and uses ESG factors to measure this activity.

Wesleyan Assurance Society's strong ISA offering, financial and non-financial benefits, and clear commitment to responsible investment were just a few of the reasons it was the worthy winner of this year's Best ISA Provider of the Year Award.



WINNER

## ESG Initiative of the Year - AXA IM Alts



### Judge's comment

*"This was an excellent initiative, showcasing a pillar approach to ESG investing and highlighting great initiatives that funds are used for."*

ESG investing continues to rise in importance, with this award recognising the firm that has developed an especially strong ESG initiative over the past year, and gained or maintained returns whilst implementing this initiative. A huge congratulations to AXA IM Alts, which proved itself to be a leader in this space.

The judges described AXA IM Alts' Natural Capital strategy as "excellent", adding that it showcased a pillar approach to ESG investing and praising the firm's entry for "highlighting great initiatives that the funds are used for".

AXA IM Alts demonstrated its commitment to addressing the dual crises of climate change and biodiversity loss through its Natural Capital strategy. The initiative leveraged more than a decade of experience and is backed by AXA Group's €1.5 billion pledge, with €500 million dedicated to natural capital. It invests in nature-based solutions that provide environmental and socio-economic benefits while generating long-term, diversified returns for investors.

The judges were impressed by the strategy's focus on projects that protect, restore, and sustainably manage critical ecosystems, and AXA IM Alts' commitment to addressing the financing gap for initiatives that tackle climate change and biodiversity decline at their source.

AXA IM Alts' Natural Capital strategy is built on three key pillars: driving impact and delivering

diversified returns, building on a foundation of experience and leadership, and addressing urgent environmental challenges. The firm's innovative approach was on full display through contributions to both ecological and social resilience by supporting a range of impact-driven projects around the world.

The firm's investment model tracks outcomes across key performance indicators, including land conservation, carbon reduction, and sustainable livelihoods, and the judges were impressed by the case studies outlined by AXA IM Alts, which highlighted the positive impacts of the initiative.

Alongside the judges' recognition, AXA IM Alts' ESG projects have been acknowledged by other organisations for their success in generating carbon credits while delivering crucial social benefits for local communities. These recognitions highlight the firm's commitment to integrating environmental and social goals, and addressing climate change, biodiversity loss, and social inequality.

Through its Natural Capital Fund, AXA IM Alts has demonstrated its unwavering commitment to tackling climate change and biodiversity loss. Using a unique model of diversified returns, its portfolio delivers on financial growth while also advancing sustainability, and benefiting vulnerable ecosystems and communities across the globe. Massive congratulations again to this year's worthy winner of the ESG Initiative of the Year Award – AXA IM Alts!



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Managers

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This is why clients trust us to manage €186 billion in assets under management<sup>1</sup>.

Investments in financial markets involve a capital risk.

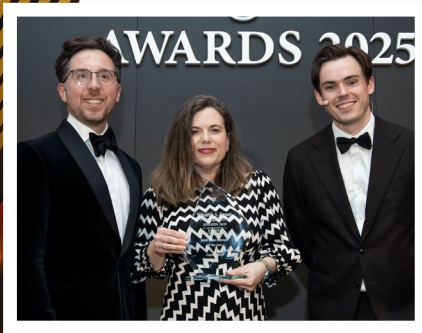
Learn more about AXA IM Alts

[alts.axa-im.com](https://alts.axa-im.com)

Source: AXA IM Alts (unaudited) as at 31 December 2024. For institutional investors only as defined by applicable local laws and regulation. Circulation must be restricted accordingly. This promotional communication does not constitute on the part of AXA Investment Managers a solicitation or investment, legal or tax advice. This material does not contain sufficient information to support an investment decision. Issued in the UK by AXA Investment Managers UK Limited, which is authorised and regulated by the Financial Conduct Authority in the UK. Registered in England and Wales, No: 01431068. Registered Office: 22 Bishopsgate, London EC2N 4BQ. In other jurisdictions, this document is issued by AXA Investment Managers SA's affiliates in those countries. Design & Production: Internal Design Agency (IDA) | April 2025| 19-11400 | Photo Credit: Gettyimages.

WINNER

## Multi-Asset Manager of the Year - Copia Capital



**copia:capital**

### Judge's comment

*"With a strong submission, Copia Capital shined with its IFA partnership model, innovative portfolios, and solid investment performance."*

The Multi-Asset Manager of the Year Award is presented to the manager that has proved itself to be ahead of its peers, with market-leading capabilities and commitment to innovation. Many congratulations to this year's deserved winner – Copia Capital!

Copia Capital won out in a hugely competitive category, with the judges saying that the firm's strong submission "shined" with its independent financial adviser (IFA) partnership model, innovative portfolios, and solid investment performance.

Working exclusively with IFAs, Copia Capital uses a whole-of-market approach which is free from in-house funds, and has an extensive professional network and world-class investment methodologies that enable it to build and manage portfolios that deliver institutional-grade insights, products, and cost efficiencies to IFAs of all sizes. Following the introduction of Consumer Duty, advisers' administrative burden has increased, and Copia Capital's premium Copia: MPS Custom service offers a unique solution that is seeing a surge in demand. The judges were impressed by the service's ability to enable firms to mitigate risk and significantly reduce the administration of managing portfolios in-house, while maintaining control over their clients' investment strategies. Copia Capital delivers market-leading bespoke portfolios, which it tailors to advice firms' preferred strategic asset allocation and target client market, providing enhanced governance and

institutional-level expertise at a similar or lower total cost to clients, alongside expert portfolio management and investment research. The firm's commitment to innovation was further demonstrated through the launch of its Select: Money Markets Portfolio, which offers an attractive, cost-effective alternative 'safe-haven', helping advisers retain oversight of this money while avoiding the risk of it moving off platform. Copia Capital also showcased why it was the deserved winner of this year's Multi-Asset Manager of the Year Award with its investment approach. The judges were impressed by how the firm constructs and manages its portfolios using the same principles as large institutional investors: setting portfolio objectives and ensuring broadly diversified and efficient portfolios are offered that maximise returns over the long term, before focusing on providing optimised strategic asset allocations. These asset allocations were proof of Copia Capital's market-leading innovations, diversified across asset classes and geographies, and blended for maximum efficiency and potential returns. Using its proprietary Risk Barometer quant modelling tool, the firm drives tactical asset allocation changes based on market conditions.

Copia Capital's ability to add value to firms and their clients by bringing institutional-level economies of scale and expert portfolio management demonstrates why it is the worthy winner of this year's Multi-Asset Manager of the Year Award.

**Wealth & Asset**  
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**WINNER**  
Multi-Asset Manager  
of the Year

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[copia-capital.co.uk](http://copia-capital.co.uk)



WINNER

## Private Equity Manager of the Year - *Neuberger Berman*



NEUBERGER BERMAN

### Judge's comment

*"We were impressed by Neuberger Berman's continued growth in the private equity management space, its ability to generate deal flow, and expertise in secondary fund investing."*

With all eyes on both risk and return, this award acknowledges the private equity experts that have displayed a true understanding of the private equity space and passion for helping clients obtain the most from this complex area of the market. This year's worthy winner for the third year in a row is Neuberger Berman Private Markets, which demonstrated its market-leading capabilities in private equity investment.

Commenting on the award win, the judges said: "We were impressed by Neuberger Berman's continued growth in the private equity management space, its ability to generate deal flow, and expertise in secondary fund investing."

NB Private Markets has continually proven its credentials through strong growth, largely driven by exemplary product innovation and an increased focus on delivering customised solutions to its clients.

This was demonstrated by Neuberger Berman's commitment of more than \$30 billion of capital across core private markets strategies of primary and secondary fund investing and co-investing in the three years ending 2024, alongside over \$23 billion over the same time period in private credit, capital solutions and specialty strategies.

The judges were impressed by NB Private Markets' establishment of a strong global network of relationships with high-quality private equity sponsors, resulting in the firm seeing an extremely high proportion of private equity funds in the marketplace,

including oversubscribed and invite-only funds. It effectively leveraged the depth and breadth of its global franchise for the benefit of investors, while demonstrating the quality of NB Private Markets' deal sourcing through its ability to secure its full desired allocations.

NB Private Markets also highlighted its direct co-investment capabilities, with its team leveraging its many active fund and professional and personal network relationships to generate deal flow. In 2024, the team sourced over 615 equity co-investment opportunities from a multitude of leading private equity firms, and committed nearly \$4.5 billion in approximately 60 new platform direct equity co-investments globally.

The judges were especially impressed by NB Private Markets' expertise in secondary fund investing across strategies, geographies, and vintages. Its team demonstrated its capabilities through performing robust, bottom-up, company-by-company valuations, and due diligence analysis.

In 2024, NB Private Markets committed over \$1.2 billion in secondary investments globally across its platform, with its extensive experience and knowledge in secondary fund investing making it a well-known and highly desirable secondary buyer.

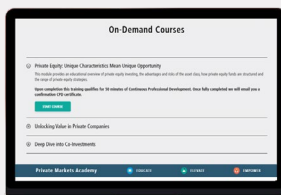
Many congratulations to the winner of the Private Equity Manager of the Year Award for the third consecutive year and fifth time overall – Neuberger Berman!

# Unlock New Opportunities: The NB Private Markets Academy

Neuberger Berman is excited to share our institutional investment knowledge with you. The NB Private Markets Academy offers cutting-edge insights to help you enhance your client portfolios with private markets exposure. Transform your investment approach and explore the Academy today.

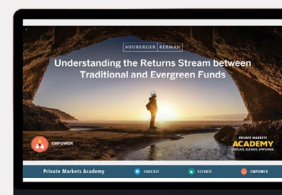
## The NB Private Markets Academy Curriculum

The NB Private Markets Academy provides cutting-edge resources to educate, elevate and empower your client portfolios with private markets exposure.



### On-Demand Learning

Explore modules with rich content in digestible chapters, tailored to your learning pace and experience level.



### Engaging Videos

Boost your knowledge on the go with quick, educational videos offering comprehensive insights into key topic.



### Accredited Learning

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### Expert Insights

Access the latest perspectives from our seasoned senior investment team, keeping you informed on industry trends and opportunities.



For more information and to access the Private Markets Academy, visit [www.nb.com/privatemarketsacademy](http://www.nb.com/privatemarketsacademy) or scan the QR code.

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## Best Digital Innovator in Wealth Management - Aventur



Innovation has never been more important in the wealth management space, and this award recognises the firms revolutionising their business and investment strategies through digital innovation within wealth management. Huge congratulations to this year's winner of the Best Digital Innovator in Wealth Management award, Aventur!

The company has continued to revolutionise access to financial advice and address the market of UK investors impacted by the advice gap.

The judges said that Aventur stood out from the crowd with its AI-powered, gamified digital advice platform that is reshaping access and delivery.

By leveraging AI and automation, Aventur's platform has transformed traditional wealth management through ground-breaking digital innovations that are fundamentally changing how investment strategies are accessed, delivered, and executed.

Its AI-driven investment framework highlighted exactly why the firm was deserved winner of this year's award with its unique data system that unites multiple financial data streams in real time.

Aventur also integrates with technology that actively monitors and responds to changes in market conditions and client circumstances, helping them provide clients with a best-in-class offering.

The judges were particularly impressed with the company's dynamic digital investment experience, with the innovative approach using AI-powered gamification to transform

complex investment decisions into engaging interactions.

Its ability to adapt to each investor's literacy level to transformed how clients interact with their investment portfolios and how they make investment decisions.

Aventur also impressed with the operational efficiency it has achieved through its automated back-office system, which has so far achieved a 30 per cent reduction in operational costs. This digital transformation helps Aventur to serve previously excluded market segments while still maintaining high-quality investment services and address the growing advice gap in the UK.

The firm's ability to innovate was further evidenced by its pioneering approach to the next generation of wealth management via its AI-powered copilot, which utilises LLMs and Autonomous AI Agents to compile user financial data, provide intelligent recommendations and assist with decision-making.

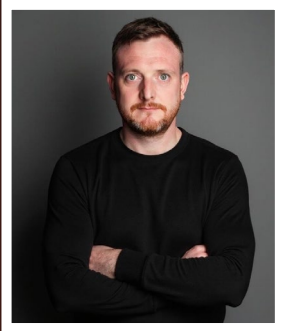
Through the combination of cutting-edge digital technology and sophisticated investment strategies, Aventur is creating a new paradigm in wealth management that is both scalable and revolutionary.

Its platform demonstrates how digital innovation can transform wealth management while enhancing investment capabilities and client outcomes.

This is one of the many reasons why the company was the deserved winner of this year's Best Digital Innovator in Wealth Management award.

### Judge's comment

*"Aventur stood out from the crowd with its AI-powered, gamified digital advice platform that is reshaping access and delivery."*



## The Future of Financial Advice: From Transactions to Meaningful Financial Outcomes

### Aventur co-founder and CEO, Stacey Body

The financial services and advice sectors are experiencing the most significant period of change in decades. Consumer expecta-

tions, regulation, technology and business models are converging to redefine what financial advice should look like, and firms that fail to evolve risk being left behind. At Aventur, we see this not as a challenge, but as an extraordinary opportunity to empower firms to protect and grow their business while delivering better financial outcomes for more people, more affordably, than ever before.

#### Why Financial Institutions Must Rethink Their Wealth Proposition

Recent research makes one fact clear: demand for financial advice far exceeds supply. With over £1.9 trillion in assets held by UK clients with £100k+ to invest, but only 14% currently receiving ongoing advice, the opportunity — and the need — for a new kind of financial solution is enormous. Yet traditional advice models with high costs and narrow target markets, cannot meet this demand alone.

Financial institutions are increasingly recognising this. Alongside neo-banks, traditional wealth managers and established financial providers are moving beyond passive robo investing and seeking holistic financial well-being solutions that combine proactive, personalised digital experiences with human expertise.

#### Built for the Future of Advice

Aventur is uniquely positioned to deliver the kind of tech-first solution institutions are searching for. More than a digital wealth platform, we provide financial institutions and advice firms with the tools to seamlessly integrate a range of tools from AI-powered health scoring and dynamic goal-based planning tools to automated intelligent insights.

These aren't generic investment features. They're deeply personalised, fully integrated financial planning experiences that slot naturally into a firm's existing infrastructure — whether through direct-to-client apps, adviser portals, or co-branded partnerships.

Aventur's technology is built to amplify human advice, not replace it. Success lies in blending digital precision with human insight, and meeting clients where they are with services tailored to their personal needs.

#### Why This Matters: From Passive Investors to Engaged Clients

In an environment where clients expect services that reflect their values and provide control over their financial futures, Aventur transforms the wealth journey from transactional to relational. By embedding proactive, real-time financial well-being insights and goal tracking directly into institutional platforms, Aventur helps financial providers increase engagement, improve outcomes and future-proof their own propositions.

All while making comprehensive, adviser-first financial planning accessible to a far broader client base.

#### Leading by Example

We're in advanced partnership discussions with several innovative neo-banks and progressive financial institutions — demonstrating the appetite for this kind of technology-driven, client-first proposition. Together, we're integrating Aventur's AI powered financial wellness tools into their customer experiences to create a new category of financial service that supports customers throughout their financial lives with personalised intelligent, data driven solutions.

#### An Inclusive Inclusive, Intelligent and Integrated Future

As the wealth sector continues to evolve, Aventur is helping financial institutions reimagine their role in clients' lives by enabling them to serve more people, more meaningfully, and more profitably, by delivering the infrastructure for scalable, digital-first, financial advice models.

We believe that in tomorrow's financial services landscape, good advice won't be a privilege for the wealthy few — it will be a seamless, embedded part of everyday financial life.

If you're ready to future-proof your client proposition and lead this shift, Aventur is ready to help.



WINNER

## Equities Manager of the Year - *Fisher Investments Europe*



FISHER INVESTMENTS EUROPE\*

### Judge's comment

*"A great example of process and client approach, FIE's performance-led strategy, macro-economic awareness, and advanced ESG capabilities made it stand out from the crowd."*

The Equities Manager of the Year award recognises the firms that have continually demonstrated exemplary business performance, delivered outstanding returns for clients, and offered high levels of innovation. This year's deserved winner is Fisher Investments Europe (FIE) – congratulations!

When choosing FIE as this year's winner, the judges said: "A great example of process and client approach, FIE's performance-led strategy, macro-economic awareness, and advanced ESG capabilities made it stand out from the crowd."

FIE's parent company, the investment manager Fisher Investments (FI), has extensive experience in managing equities and has continuously strived to find innovative ways to generate excess returns for its clients' portfolios and expand its capabilities.

FI's unique top-down approach to investment management enables the firm to capitalise on performance spreads between countries, styles, and sectors by actively allocating to them over time. Furthermore, its analysis of economic, political, and sentiment factors allows FI to identify opportunities and manage risk more effectively when determining portfolio positioning, giving the firm a competitive advantage.

FI's flexible investment approach avoids permanent biases to enable the firm's offerings to adapt to the rapidly changing market conditions through category rotation. These

innovative strategies are designed to be core over a full market cycle and deliver alpha no matter what the market environment looks like.

The success of FI's top-down process was evident in the performance of its investment strategies. The proposed institutional investment strategies have consistently outperformed the benchmarks more than 75 per cent of the time over a three-year rolling period since inception, demonstrating FI's ability to produce excess returns across various geographies, styles, market capitalisations, and with varying levels of ESG integration.

Alongside these impressive credentials, FI further demonstrated why it won this year's Equities Manager of the Year award with its advanced ESG capabilities and unique client service approach. This was highlighted by a case study whereby FI partnered with one of its UK pension affiliated clients to enhance the client's overall stewardship programme. They co-engaged with a company in the pension affiliated client's portfolio, which resulted in FI filling specific gaps in the coverage the client receives from their third-party engagement service provider and enhancing its overall programme.

This was just one of many examples of FI's exemplary client service efforts during the year, again highlighting why it deserved to win this year's Equities Manager of the Year award – congratulations FI!

# MONEYAge

## AWARDS

### 2025

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