SARASIN
& PARTNERS

WHO ARE WE?

Sarasin & Partners, a specialist asset manager, trusted to invest £12.9 billion (31.03.2020) on behalf of charities, private clients, institutions and intermediaries globally. Our aim is to always deliver lasting value for our clients, pinpointing the drivers of global change to capture the most compelling investment opportunities.

> “We are pleased to be working with Standard Life Aberdeen on their new IMA technology. Our long history of multi asset investing, preserving and growing the real value of clients assets, has allowed us to demonstrate good client outcomes in different market environments.”
>
> Christopher Cade, Head of UK Sales

ABOUT OUR MODEL PORTFOLIO SERVICE

1. Sarasin & Partners has one of the longest track records of multi-asset investing in the UK with our first fund launched in 1988.
2. We launched our model portfolio service in 2013, providing five core model portfolios, differing in their risk and target-return profiles.
3. We are pioneers in responsible investing and recently extended our service to provide five responsible models. These portfolios embed ESG factors and incorporate ethical restrictions.
4. The models have been built around a core commitment, to preserve and grow the real value of your clients’ assets over time.
5. Your clients will benefit from a Multi Asset, Multi Manager and Multi Strategy investment proposition.
6. You are not limited to our ‘off the shelf’ portfolios; we have the ability to create bespoke model portfolios for your firm.

KEY FEATURES TO OUR INVESTMENT APPROACH

Our distinctive investment process sets us apart from our peers. In addition to our responsible stewardship approach, it is built on the following pillars:

Global – Sarasin is one of the only discretionary fund managers to offer a truly global approach to equity investment. We are not constrained to any particular region; we prefer to invest in companies that will benefit from long-term secular growth trends, regardless of where they might be listed.

Thematic – Our thematic philosophy has been at the heart of our process for over 15 years. At present we are focussing on enduring mega-themes such as digitisation, automation, climate change, ageing and evolving consumption. We believe this gives us a better perspective of the investment opportunities available and provides superior returns over the long term.

Multi-strategy – The portfolios gain exposure to a variety of different asset classes. Our in-house funds are used as a core, providing access to our renowned investment approach and responsible stewardship philosophy. This is supplemented by a number of best of breed active and passive third-party funds from across the market.

Long-term – We are long-term in our investment approach, looking a decade ahead and taking a holistic view of the underlying financial performance of the investments we make on behalf of our clients.

PARTNERING WITH YOU

We can also tailor portfolios to meet the specific needs of your clients:

WHAT CAN BE TAILORED?

- **Investment objective** - portfolios can target an investment objective of growth, income or a combination of both dependent on client outcomes
- **Investment strategy** – active, passive or blended portfolios
- **Responsible edge** – portfolios focussing on positive, negative and stewardship screening for responsible investors
- **CGT mitigation** – managing CGT liability on an individual client basis
- **Cost structure** – flexible dependent on IFA requirements
- **Structure** – creating model portfolios or investment funds

OUR SERVICE COMMITMENT TO YOU

- **Rebalancing and switching done on your behalf**
- **Direct access to our Model Portfolio Team for portfolio and market information**
- **We create client brochures, factsheets and quarterly reports to save you time**
- **We present at your client seminars and keep you updated at your investment committee meetings**
- **Dedicated and regionally based business development team to support you every step of the way**

CONTACT US

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IMPORTANT INFORMATION

This document is for investment professionals only and should not be relied upon by private investors.

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The investments of the Model Portfolios are subject to normal market fluctuations. **The value of the investments of the Model Portfolios and the income from them can fall as well as rise and investors may not get back the amount originally invested.** If investing in foreign currencies, the return in the investor's reference currency may increase or decrease as a result of currency fluctuations. **Past performance is not a guide to future returns and may not be repeated.**

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