For adviser use only

copia:capital

Copia Capital Management fact sheet

What is your corporate background?

Copia Capital Management is a Discretionary Fund Management facility. It was established in 2013 by Novia Financial plc to provide cost effective, diversified, multi-asset portfolios for a given set of portfolio objectives which are constructed primarily using Exchange Traded Funds. Each range of Copia portfolios has a different objective addressing different client needs. A fundamental part of Copia's philosophy is the belief that the main driver of portfolio outcomes is allocation across a broad range of asset classes. Industry-based research has shown that asset allocation, rather than stock selection, is the main driver of portfolio returns. Copia's investment approach uses quantitative algorithms for asset allocation and risk management purposes.

Why should I consider using your discretionary fund management service?

Copia offers a proven route for IFAs to reliably de-risk their investment activities with a range of industry-leading portfolio services. Working in partnership with us allows IFAs to achieve great client outcomes, because every investment decision is underpinned by Copia's data driven approach and technical know-how. We add value to the work IFAs do by sharing our extensive experience in Discretionary Fund Management and by offering a fresh and value based partnership approach. We're now one of the most respected DFMs in the industry. In 2021 we were awarded the "Best Value for Money" DFM by Citiwire Awards and short-listed in 3 other categories. This success reflects the tight-knit, modern partnerships we have with our clients. Now backed by Anacap Financial Partners, Copia is a stable business with strong growth and is seeing an increasing demand for our services. We continuously strive to achieve that same high performance for you, our clients.

What is your approach to discretionary fund management?

Our investment decisions are driven by experience and our belief that the main driver of portfolio return outcomes is asset allocation rather than stock selection. Copia's processes are quantitatively driven, but our investment team retains oversight and control over the entire investment process, personally managing clients through every stage. Our highly scientific investment methodology is guided by Copia's specially developed and proprietary Risk Barometer. This ensures that tactical asset allocation decisions are always driven by a quantitative process, reducing manager risk and behavioural biases.

What investment solutions can you offer through the Nucleus platform?

We offer a range of Managed Portfolio options - standard 'off the shelf', white labelled and custom built for advice firms.

What are your fees?

The standard charge for using the Copia portfolios is 0.25%pa for blended portfolios and 0.20%pa for passive portfolios. The charge for Custom portfolios, White Label portfolios and our bespoke research service varies depending on agreed Terms of Business.

Who should I contact to discuss the service further?

Our Head of Sales Tony Hicks (07703 189164 / tony.hicks@copia-capital.co.uk)