



Twenty20 Investments fact sheet

What is your corporate background?

Twenty20 Investments was founded at the start of 2012 with the aim to set up the next generation of investment management business to take advantage of the great opportunities that ETFs offer the end investor. The attractive features of ETFs which includes lower fees, transparency and daily liquidity act as ideal building blocks when constructing multi-asset investment solutions for the discerning investor.

Having spent many years in the fund management industry targeting the institutional and wealth sectors, first within Barclays Global Investors' active business and subsequently at BlackRock's passive iShares' business, the team at Twenty20 bring a wide range of industry experience to the table. This includes systematic investment strategies, the research and development of many ETF products and the implementation of full suite of ETF Model Portfolios for iShares' clients in the US.

Why should I consider using your Discretionary Fund Management service?

Are you fully unlocking the potential of your fee based advice service? At Twenty20 we recognize the unprecedented levels of regulatory and technological changes your business is facing. Our mission is to help you leverage the tools and platforms today's marketplace offers and help you grow your business.

Reduce costs and pass on these benefits to your end investors. Freeing up more time for you to focus on your clients is a sure fire way to enhance your firm's financial planning offering, and sometimes business decisions can be as simple as that. A good place to start is streamlining your investment process and translating that into cost savings for your end investors.

What is your approach to discretionary fund management?

Investment Philosophy

Twenty20 Investments constructs diversified portfolios built entirely from ETFs, aiming to achieve outperformance by optimizing and adjusting the weights using various macro-economic forecasting models and market indicators.

Our asset allocation adapts to changes in the markets aiming to protect capital in a falling market while looking to outperform inflation-linked benchmarks by identifying the best investment opportunities in a timely manner.

Investment Strategy

We use the versatility of ETFs to gain exposure to a wide range of asset and sub-asset classes which makes the portfolio liquid, well diversified and economically priced. Our risk budgeting process delivers diversified holdings across multiple asset classes aiming to provide more stable returns, reduced volatility and seeks to ensure profits are taken as and when appropriate.

We use state of the art technology to screen an extensive set of market, macro-economic and ETF data from around the world. This enables us, along with human overlay, to determine economic cycles and risk appetite in the markets and to capture the risk premia across various asset classes.

The ETFs are selected by our Fund Research Department. This rigorous and systematic research process carefully analyses a wide universe of ETFs and the best investment opportunities as and when they occur.

What investment solutions can you offer through the Nucleus platform?

Multi-Asset ETF Model Portfolios

We offer a suite of real return ETF portfolios aiming to outperform inflation and providing real returns for the investor, with a minimum investment size of £15,000. Our asset allocation process adapts to changes in the markets aiming to protect capital in a falling market while looking to outperform inflation-linked benchmarks by identifying the best investment opportunities in a timely manner.

Real Return ETF Portfolios	Asset Class	Target Risk	Target Benchmark
Cautious Real Return iBasket	Equity, Fixed Income	2% to 5%	RPI
Balanced Real Return iBasket	Equity, Fixed Income, Alternatives	5% to 10%	RPI + 2%
Growth Real Return iBasket	Equity, Fixed Income, Alternatives	10% to 15%	RPI + 4%
Adventurous Real Return iBasket	Equity, Fixed Income, Alternatives	15% to 25%	RPI + 6%
Income Real Return iBasket	Equity, Fixed Income, Alternatives	5% to 10%	RPI + 2%
Enhanced Income Real Return iBasket	Equity, Fixed Income, Alternatives	5% to 15%	RPI + 4%
Cautious-Balanced SRI Real Return iBasket	Equity, Fixed Income, Alternative	3% to 8%	RPI + 1%

What are your fees?

Real Return ETF Portfolios	AMC
Cautious Real Return iBasket	35bps plus VAT
Balanced Real Return iBasket	35bps plus VAT
Growth Real Return iBasket	35bps plus VAT
Adventurous Real Return iBasket	35bps plus VAT
Income Real Return iBasket	35bps plus VAT
Enhanced Income Real Return iBasket	35bps plus VAT
Cautious-Balanced SRI Real Return iBasket	35bps plus VAT

Who should I contact to discuss the service further?

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