



EQ Investors factsheet



What is your corporate background?

EQ Investors (EQ) is an award-winning boutique wealth manager, led by John Spiers, the founder of Bestinvest. We provide financial advice and investment management to individuals, small companies and charities around the UK.

EQ is an experienced provider of discretionary fund management (DFM) model portfolios. We offer access to diversified investment portfolios that cater for investors with different preferences and risk appetites.

Why should I consider using your Discretionary Fund Management service?

Achieving good investment returns requires an excellent team. Our experienced portfolio managers have a proven track record of managing multi-asset portfolios and are supported by a highly skilled team of investment research analysts.

Our DFM service allows external advisers to effectively outsource the day-to-day management of clients' portfolios, freeing up time to focus on what they do best: maintaining client relationships and dealing with non-investment issues such as effective tax planning.

What is your approach to discretionary fund management?

All of our portfolios are based around collective investments because we are convinced that is the best way to maximise performance. Our allocations to assets are driven by our analysis of fundamental value and our fund selection techniques incorporate sophisticated analysis of track records coupled with intensive interviews of each manager.

What investment solutions can you offer through the Nucleus platform?

The best companies have always been the ones that innovate, find new ways to serve real needs and solve real problems, and we wanted to capture these impact investment opportunities. Whilst there were plenty of ethical funds, we identified a growing demand from retail investors for a discretionary managed model portfolio approach.

In response, EQ designed a unique investment strategy called positive impact, where ethical investing is reinvented to the challenges of the 21st century. This led to the launch of EQ's Positive Impact Portfolios (PIPs) in 2012 and they have been a terrific success, both in terms of performance and popularity.

The main purpose of these portfolios is to go much further than screening out controversial companies and invest in companies that are bringing new solutions or services to tackle social and environmental issues globally. The portfolios are for investors that:

- Are seeking strong financial returns over the long term.
- Prefer to invest in industries and businesses that aim to deliver social and environmental benefits through their activities.
- Are concerned about the damage that certain industries and types of business can cause to society and the physical environment.

We believe that this unique proposition is of interest to a growing number of investors. They can be used as a stand-alone investment solution for those who view social and environmental considerations as paramount to their investment objectives, or as separate specialist portfolios.

There are seven levels of risk graded model portfolios available, with the maximum equity exposure ranging from 45% for a cautious risk profile to 100% for a high risk profile.

What are your fees?

- Annual Management Charge: 0.35% (+VAT)
- Weighted fund charge: 0.70% as at 1 October 2016 for a balanced risk profile

Who should I contact to discuss the service further?

If you have any questions, please contact:

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