



## Newscape Capital Group



### What is your corporate background?

Newscape was established in the UK November 2008 via the acquisition of E-vestment Ltd. and was subsequently named Newscape Capital Group Ltd. Newscape Capital Group is a specialist investment and advisory firm providing first class products and services for institutional and intermediary clients.

Newscape is independent and owned entirely by its directors. The management team has an average of over 20 years' experience in the investment industry, with successful track records of producing above average returns across a range of strategies. Newscape's directors believe that markets are not always efficient, and that opportunities exist particularly for investors who are able to adopt a dynamic asset allocation approach, and focus on medium to longer term outcomes.

### Why should I consider using your Discretionary Fund Management service?

Newscape model portfolios offer an institutional quality solution to advisors that combines sophisticated quantitative strategic portfolio construction, active macro tactical adjustments and alternative low-cost or blended active fund implementations.

Additionally Newscape Capital Group has no direct relationship with the underlying client. This provides advisers with the security that they retain full responsibility and control of the entire client relationship.

### What is your approach to discretionary fund management?

Our Investment Committee members have an average of over 15 years' experience in investment management. The Committee adopts a top-down approach, meeting fortnightly to debate and determine the best Tactical Asset Allocation and investment opportunities available given the prevailing economic environment.

The portfolios are based on Strategic Asset Allocations which are constructed with reference to 20 years of underlying asset class risk and return data across a broad range of investment classes and regions. By weighting this broad range of investments, we have created a set of multi-asset portfolios which aim to optimise expected return for a set level of risk over the 'medium to longer term'.

However, the 'shorter term' offers significant market opportunities and pitfalls that we can attempt to take advantage of and/or avoid respectively. Hence, we employ a Tactical Asset Allocation overlay with a view to capturing these shorter term market trends, the Investment Committee taking an Overweight/ Neutral/ Underweight stance against our base case Strategic Asset Allocations.

Tactical Asset Allocations are populated with a selection of collective investment funds (OEICS, Unit Trusts, Investment Trusts and ETFs), from our extensive preferred list, using our thorough quantitative and qualitative fund screening processes.

### What investment solutions can you offer through the Nucleus platform?

The Newscape Managed Portfolio Service is a range of five multi-asset risk adjusted portfolios – Defensive, Cautious, Balanced, Opportunistic, and Growth – and one Income portfolio.

Whilst our asset allocation process is dynamic across all of our service levels, our portfolios are available in two forms. Our 'Active' solution sees asset allocations predominately fulfilled through the use of actively managed investment funds. Alternatively, our 'Blended' Low-Cost Implementation solution uses a mix of both actively managed and passive funds with the aim of optimising returns albeit at a lower underlying holding cost. Consequently, our Managed Portfolio Service offers a scale of pricing points to suit your clients' needs.

We understand that managing client risk is key. Hence, all portfolios are monitored on an ongoing basis to ensure that the risk budgets are maintained over time.

In the absence of any proposed monthly portfolio changes, rebalancing will default to the calendar quarter end.

We have no upfront charges, and all of our portfolios are available at an annual management fee of 0.25% +VAT. For our 'Active' solution, we aim to keep the underlying funds weighted OCF (Ongoing Charges Fee) of each portfolio below 90 basis points. In the case of our 'Blended' Low Cost Implementation solution we aim to keep the underlying funds weighted OCF of each portfolio below 30 basis points.

Model Portfolio	AMC
Newscape Defensive	0.25% + VAT
Newscape Cautious	0.25% + VAT
Newscape Balanced	0.25% + VAT
Newscape Opportunistic	0.25% + VAT
Newscape Growth	0.25% + VAT

Prices exclude (1) Underlying fund Ongoing Charges Figure – OCF (2) Any platform charges that may apply (3) Financial Adviser charges.

### Who should I contact to discuss the service further?

For more information please contact:

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