copia:capital

Working with your adviser to deliver your investment goals

copia-capital.co.uk

You selected your personal investment adviser for many good reasons. You trust them and the advice they provide and, thanks to their partnership with Copia Capital Management, you can be even more confident that you are now getting the very best solutions throughout your investment lifecycle.

Think of Copia as your adviser's independent investment partner. Your adviser looks to us to provide institutional level research, investment advice, back-office facilities and a control centre rolled into one, so that they are freed up to focus on you and your investment goals.

Who are Copia?

Copia Capital is a multi-award-winning Discretionary Fund Management (DFM) provider, founded in 2013. We're an internationally experienced team and work with leading advisers across the UK.

"We value Copia's analysis and market perspective which then enables us to advise our clients better – this is particularly important at times when the markets are very unstable."

An independent adviser

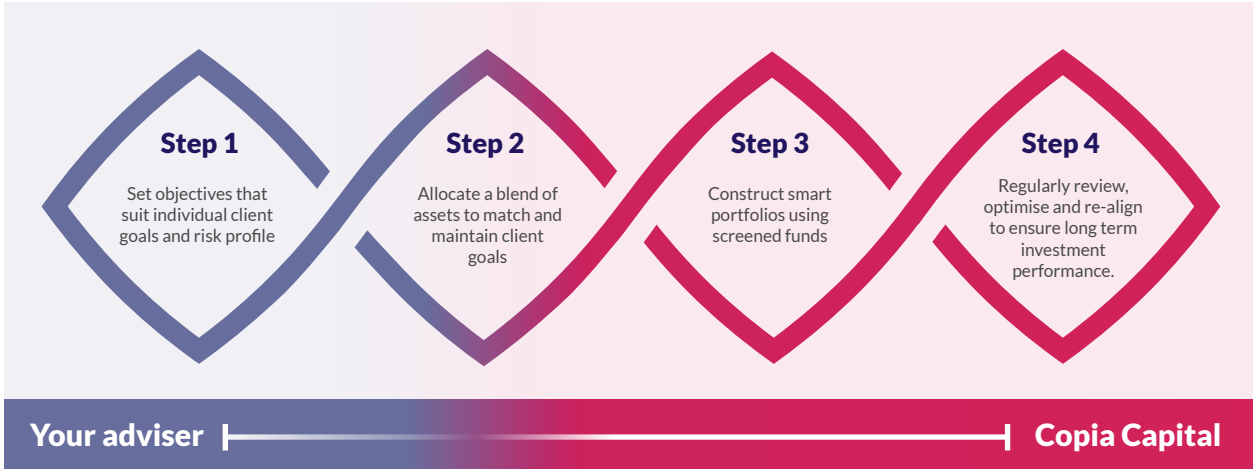
5 Key Reasons To Trust Copia With Your Money

1. We're focused on supporting your adviser to meet your exact objectives, whether that's maximising portfolio returns, generating income or preserving capital, over your investment lifecycle.
2. Our efficient portfolio selections combine passive and active funds. The portfolios are all rated for environmental, social and governance (ESG) criteria using independent MSCI ESG Fund Ratings.
3. We're impartial and objective, and our portfolio services are based on a scientifically-informed, quantitative methodology.
4. We take an active approach to managing risk, with regular portfolio reviews, working in partnership with your adviser.
5. Our institutional level efficiency enables us to drive down costs and help your adviser deliver cost-effective investments for you.

How your adviser works with Copia

Copia works exclusively with professional advisers across a wide range of investment platforms to help them better serve their client needs. Your adviser takes the time to understand your goals and expectations and then works with Copia to apply these objectives to selecting and managing the best possible fund portfolio.

We use a proven, 4 step process, which is consistently applied across every one of our portfolios



Monitoring, aligning and regularly balancing risk

Copia uses a mix of active and passive funds to construct portfolios. Passive funds give access to the markets at low cost with active funds only added to portfolios in selected markets where our a scientifically-informed methodology suggests they are likely to add to investment performance.

The funds we use are all transparent, liquid and cost efficient, which allows for more targeted risk management at portfolio level.

Copia's portfolios are regularly monitored by our quantitative modelling tools to check whether any re-alignment is needed.

Working in partnership with your adviser, Copia's proven approach ensures your hard earned money is invested widely and always working as hard for you as it possibly can.

How we work

Copia has created a scientific toolkit with four key elements. This, together with our research capabilities enables us to manage investment portfolios with impressive results.

Quant model

Two common risks when it comes to investing are emotion and unconscious bias. Our Quant Model strips away any preconceptions and bias, to ensure the decision to invest in a particular asset class is driven only by past performance and predicted returns given the current economic outlook.

Fund Screener

There are thousands of potential fund options and just a handful will satisfy your investment goals. Copia's Fund Screener filters out the best options according to cost efficiency, liquidity, consistency of performance and currency.

Optimisation Tool

Different asset classes deliver different risk-return metrics and Copia's Optimisation Tool ensures each client's fund portfolio is continually being fine-tuned to meet their target outcomes.

Risk Barometer

Gives clients the reassurance of an extra layer of financial protection. Our Risk Barometer steers investment portfolios towards safer asset classes during periods of uncertainty and diminishes exposure to riskier investments.

Understanding the risks

Your adviser will work with you to select the portfolio services that best match your investment goals and individual risk profile. We take this a step further by managing your portfolio to give you the best of opportunities to achieve those targets. However as with all investments, there are some considerations and risk factors to be aware of:

- Investment model portfolios may not be suitable for everyone
- The value of funds can increase and decrease, past performance and historical data cannot guarantee future success
- Investors may get back less than they originally invested.

Get in touch with your adviser to take the next step towards more successful investments