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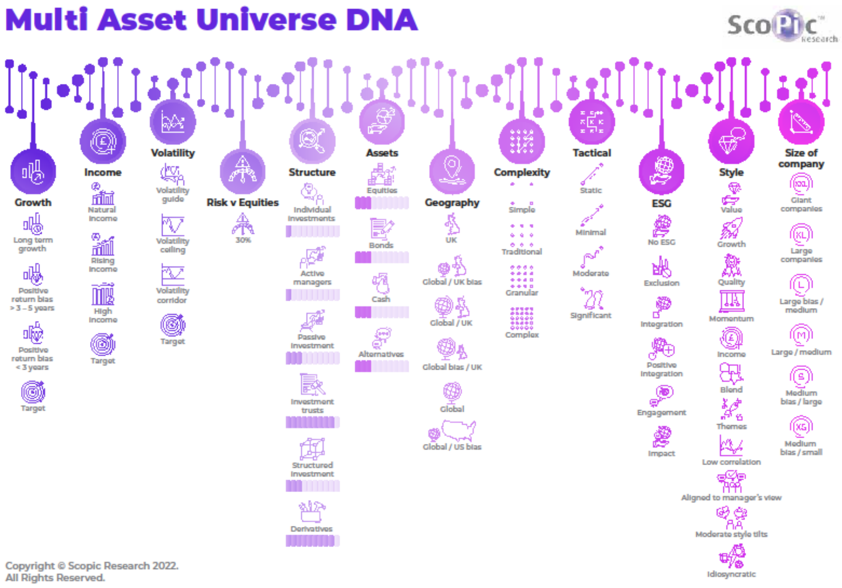
# Press Release

## Ground-breaking launch – Every Multi Asset Fund has its own unique DNA!




On 6th July we're launching three ground-breaking twists on multi asset investment research that aren't available anywhere else – and it's all free for intermediaries to use. Our detailed research covers more than 100 multi asset funds from 16 different fund groups (at launch). All funds have passed our strict quality criteria and investment teams are subject to annual reviews and quarterly monitoring checks.

(Paul Ilott, Managing Director, Scopic Research):

"If intermediaries currently recommend, review, or blend multi asset funds for their clients, then they need to know about each multi asset fund's unique DNA because this can be key when preparing clients for the likely investment journey and therefore contributing towards the intermediary's consumer duty obligations. It's also vital for monitoring multi asset fund performance, and when considering client suitability."

"Our launch is the product of more than 10 years researching multi asset solutions."

Intermediaries will have access to:

### Multi Asset DNA reports on individual funds

### A Unique Portfolio Blending Tool

### A Multi Asset Teams' Sentiment Indicator

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Intermediaries will be able to:

## Filter our multi asset funds database

Intermediaries will be able to filter our multi asset funds database of DNA reports by using combinations of investment outcomes specifically designed to reflect client needs for different classifications of growth, income delivery, volatility management, likely volatility risk versus broader equity markets, and methods of ESG management.

## Access to individual Multi Asset DNA reports that include…

- Reports include a ground-breaking graphical depiction of each multi asset fund's unique DNA characteristics.
    - Intermediaries can use the graphics to help them explain the recommended fund to their clients.
- Our analysis of the likely investment journey will then help intermediaries to better understand when an individual multi asset fund is likely to perform well or is expected to face challenges versus its peer group, depending upon market conditions.
    - This will help intermediaries to become more tolerant of periods of apparent tepid performance when our research suggests that this is probably what we should expect from the fund, or to be more critical, when our research suggests otherwise.
    - It will also better equip intermediaries to advise their clients about what they can expect and therefore contributes towards them fulfilling their own consumer duty obligations.
- Reports also include detailed analysis of each multi asset fund's intended investment outcomes, scope of investment, approach, and the investment journey.
- Key briefing notes are included alongside in-depth analysis for speedier reading.
- Helpful suitability hints are shown for client matching.

## Use our Portfolio Blending Tool.

- The graphics are designed to help intermediaries to visualise the possible diversification benefits (the resulting DNA) from combining their choice of two multi asset funds together in one larger client portfolio.
    - Our aim is to help intermediaries to avoid building Frankenstein's monster portfolios that compound the same performance drivers such as investment styles and other factors.

## Access our Multi Asset Teams' Sentiment Indicator.

- Our quarterly sentiment indicator shows the current direction of sentiment towards a broad range of asset classes as expressed by some of the UK's leading multi asset teams.

Intermediaries can register for free access at www.scopicresearch.co.uk

## Contact

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## About Scopic Research

Scopic Research was established in 2009 to enable investment professionals to benefit from the same information advantages that a skilled analyst with direct access to portfolio managers has when seeking to recommend multi asset investments to their clients.

We conduct robust, insightful research to provide you with a greater understanding of the likely investment journey for a given multi asset portfolio, more meaningful peer groups, and vastly improved differentiation between propositions.

The sources we use are predominantly primary. This includes regular portfolio manager meetings and quarterly qualitative-based monitoring. We also analyse risk adjusted performance between market inflection points using quantitative data.