

Manager Selection

Needs Analysis

Strategic Asset Allocation

Manager Selection

Tactical Asset Allocation

Portfolio Construction

Monitoring

Rebalancing

Monthly Reporting

- We employ a multi-manager approach, as no one manager can be an expert in all fields, yet many managers are exceptionally talented within their area of expertise. We prefer to take advantage of these experts within their fields of excellence and provide a top down asset allocation.
- We apply various selection criteria which include a quantitative filter at the uppermost level whilst thereafter applying more qualitative filters. The qualitative filters include checks such as regulatory compliance, documented investment strategy and execution thereof, team background, etc.
- We monitor managers on an ongoing basis for changes within the teams / management companies and monitor their performance within their peer groups.