

Evercore Pan-Asset Capital
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Evercore Pan Asset
Keeping it Simple

Evercore Pan-Asset Press Release

EVERCORE PAN-ASSET LAUNCHES MODEL PORTFOLIOS ON NOVIA PLATFORM

Asset allocation and ETF specialist Evercore Pan-Asset (EPA) today announced that its range of PanDYNAMIC model portfolios is now available on the Novia platform.

The launch onto the Novia platform follows the recent launch onto the Transact platform and is part of a strategy to broaden access to Evercore Pan Asset's popular range of risk-rated investment solutions.

Christopher Aldous, Chief Executive of Evercore Pan-Asset Capital Management commented:

"Novia is increasingly popular with IFAs and we are extremely pleased that our PanDYNAMIC model portfolios will now be available through their platform.

"Novia is known for transparent charging which makes it a natural choice to fit with our commitment to offering low-cost, simple investment opportunities."

Paul Boston, Sales Director of Novia , added:

"The PanDYNAMIC Model Portfolios are flexible and low cost, we have seen considerable adviser demand for these portfolios and are delighted to be able to offer them on our platform.

The EPA dynamic asset allocation process combines long term investment in assets with shorter-term tactical decisions designed to protect capital in difficult market conditions.

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Notes to editors

About Evercore Pan-Asset Capital Management

Boutique investment house Evercore Pan-Asset was launched in 2007, offering clients a proprietary investment management approach based on a dynamic asset allocation process. This is coupled with a passive implementation of asset decisions, mainly via the use of index-

tracking ETFs. Clients include pension funds, charities, university endowments and private wealth managers.

Evercore Pan-Asset Capital Management's founders are John Redwood (former Cabinet Minister and previously Investment Manager and Director at Rothschilds) and Christopher Aldous (former Chief Executive of Absolute Fund Management). The firm's investment committee also includes Guy Davies (former Head of Charities and Philanthropy at Barclays Wealth) who leads their provision of asset allocation advisory and investment management services to charities.

Since 2008 the firm has been 50% owned and backed by the US corporate advisory and investment management firm, Evercore Partners (EVR).

About Novia Financial plc

Novia Financial plc launched to market in October 2008 to provide a comprehensive wealth management service or 'full wrap platform' for investment advisers and their clients. Novia provides a transparent pricing structure as well as access to a wide range of product wrappers each with their own Cash Facility, an extensive suite of portfolio management tools, and access to an extensive range of investment classes including shares, bonds, traditional authorised funds, ETFs and alternative investments.

The core operating system is provided by Australian based GBST who have been developing software solutions for fund administration and financial services since 1996, and for wrap solutions since 1999, amassing \$186bn (AU) in assets under management on their systems. The comprehensive suite of portfolio management tools is powered by Financial Express, who also provide the data for the platform, and the illustrations are provided by Dunstan Thomas.

The Novia team, based in Bath, is led by Bill Vasilieff ex Sales and Marketing director and joint cofounder of Selestia. Novia as an independent proposition has substantial financial backing from a combination of private individuals and corporate organisations. The board is chaired by Sir Anthony Cleaver (former chairman and chief executive of IBM in the UK). Other members include John Beaumont, non executive, who has held a number of non executive roles in major public organisations and several technology startups, Tim Levy (non executive and investor), Chief Executive of Future Capital Partners, David Royds (non executive and investor) Chairman of Matrix group and Bill Vasilieff as CEO. Novia Financial plc is authorised and regulated by the Financial Services Authority.

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