

"This is what we do"

Thurleigh is a fast-growing, independent, wealth management business which specialises in managing model portfolios for private clients. It is a fund manager of choice for senior professionals in the financial services industry. For more details visit Thurleigh.com

This is what we do

We are unconstrained global asset allocators and unlike other Discretionary Fund Managers on Novia, our process, strategy and models are exactly the same on the platform as for the rest of our business.

We eat our own cooking

The founding partners of Thurleigh have the entirety of their personal wealth invested in these model strategies.

Low Total Expense Ratio (TER)

Our expertise both in index funds and the institutional fund management world means that we can keep the Total Expense Ratio low.

Award-Winning Investment Team

Charles MacKinnon, CIO, has over 25 years experience in wealth management and the partners' average length of investment experience is 13 years. The seven-strong investment team are highly qualified, with three CFA charter holders.

No Cross Selling

These models have our full attention; we do not have in-house funds; we do not have a financial advisory division; this is the entirety of what we do.



"Novia was a natural fit for us as from the outset we have managed our portfolios on a risk adjusted model basis. This is what we do".

**Charles MacKinnon, CIO
& Founding Partner**

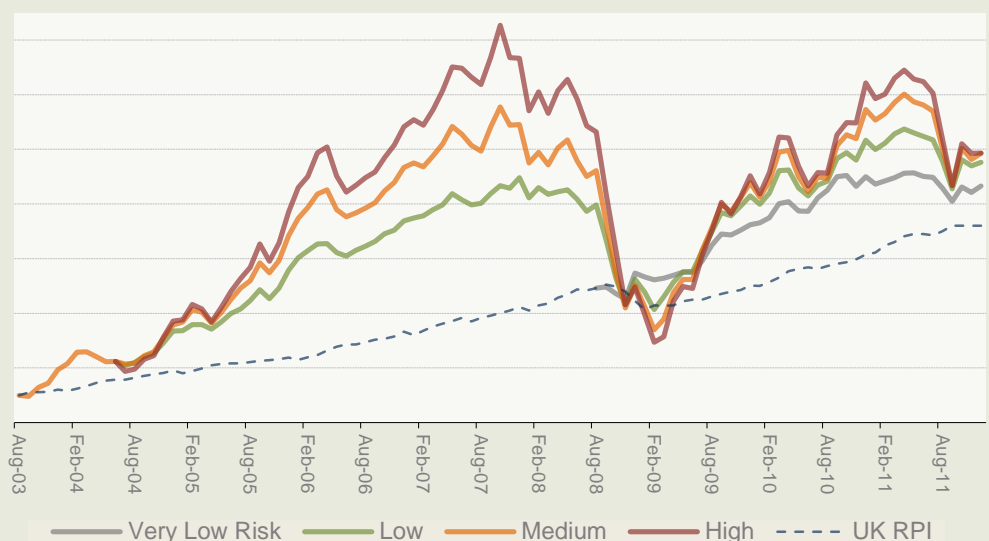
Risk: Clarity and Transparency

IFAs can now access our four risk model portfolios

The strategies have a proven track record of up to 8 years (see time-weighted performance chart, right)

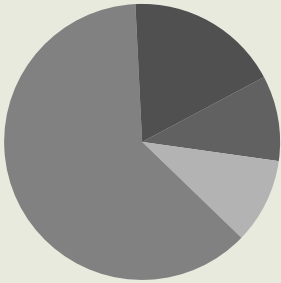
IFAs can be confident in assessing suitability and explaining to their clients what return to expect from each risk profile

We also produce an easily digestible, monthly investment review E-mail

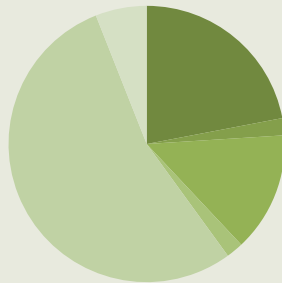


Typical Asset Allocation

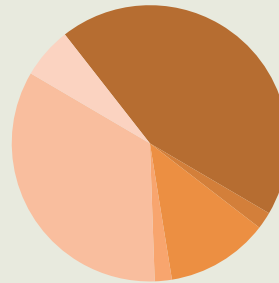
Very Low Risk



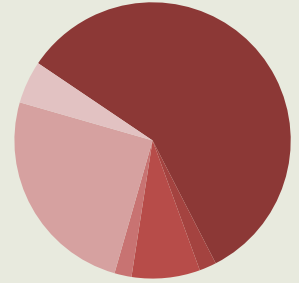
Low Risk



Medium Risk



High Risk



Equity	10%
Absolute Return	10%
Fixed Income	62%
Cash	18%

Equity	22%
Property	2%
Absolute Return	10%
Commodities	2%
Fixed Income	54%
Cash	6%

Equity	44%
Property	2%
Absolute Return	12%
Commodities	2%
Fixed Income	34%
Cash	6%

Equity	58%
Property	2%
Absolute Return	8%
Commodities	2%
Fixed Income	25%
Cash	5%

To provide **capital stability** whilst retaining the opportunity for some participation in market returns through a limited allocation to risk assets. A minimum of 75% is typically held in cash and bonds.

To achieve **capital preservation in real terms**. A significant proportion (usually at least 50%) of the portfolio will typically be held in cash and bonds.

To achieve a **positive return above cash or inflation over multi-year periods**. More capital risk is accepted than in the lower risk strategies in return for the opportunity of capital growth.

To achieve **capital growth above cash or inflation over multi-year periods**. As consequence both the volatility of returns and the capital risk should be higher than in our more conservative strategies.

Our Story

Thurleigh Investment Managers is an independent wealth management business based in London, which specialises in managing portfolios for both onshore and offshore private clients and charities. It has approximately £300 million of assets under management.

Thurleigh was founded in 2003 by David Rosier and Charles MacKinnon. David was Chairman of the private client and charities division of Mercury Asset Management and subsequently of Merrill Lynch Investment Managers from 1988 to 2002, and Charles was an Executive Director of Goldman Sachs International from 1985 to 2000. The company is named after Thurleigh Road, where David and Charles were neighbours prior to the Company's founding.

Charges

Thurleigh's discretionary portfolio management fee on Novia is 0.3% per annum (plus VAT).

Contact

For more information please contact your Novia Regional Sales Manager or speak to Briony Thomas at Thurleigh Investment Managers on:

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Alternatively visit our website www.thurleigh.com or  Follow us on Twitter