

Portfolio Aim

The Nexus Global Solutions Portfolio is an actively managed, globally diversified, multi-asset class portfolio. The aim is growth over the medium term, with a dual focus on capital protection and capital appreciation. An understanding of macro economic conditions together with detailed research into individual securities is used to construct a diversified, highly liquid portfolio, able to adapt to a unique range of market conditions.

Investment philosophy

The Nexus Global Solutions Portfolio is operated by Quilter Cheviot Investment Management, one of the UK's largest independently owned investment management firms.

Quilter Cheviot is one of the UK's largest independently owned discretionary investment firms, which can trace its heritage to 1771. The firm is based in thirteen locations across the UK, Jersey and Ireland and has total assets under management of £15.2bn (as at 31 December 2013). Quilter Cheviot focuses primarily on structuring and managing bespoke discretionary portfolios for private clients, charities, trusts, pension funds and intermediaries.

Quilter Cheviot's investment framework combines the skills of a dedicated research team with those of experienced investment managers, to provide the optimum return for our clients. We generate investment ideas from across the globe, research these and undertake due diligence to validate these opportunities and review these regularly. We believe that the best results come from a mix of styles adapted to the market cycle; our objective is to identify future trends and give this due emphasis within portfolios. At a strategic level, long-term portfolios are centred on the long-term returns expected from asset classes, enhanced by exploiting market inefficiencies. We also make active, shorter term, tactical asset allocation decisions. All key investment committees are chaired by – and include amongst their membership – individuals with client facing investment management experience. These committees provide a set of recommendations which investment managers are able to utilise when implementing investment strategies suitable for each individual client.

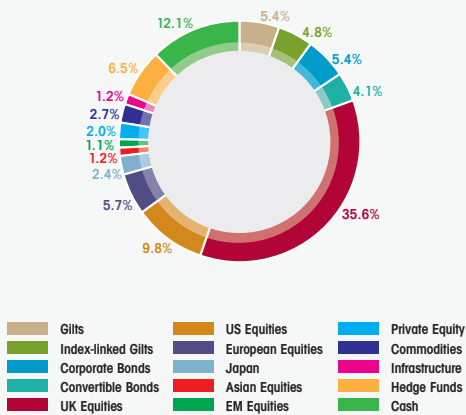
We aim to reflect our views on asset class and geographical allocation through the portfolio and support these with conviction ideas. To select our holdings we use a combination of quantitative analysis, in-house fundamental research and company visits. When selecting collective funds we insist on face-to-face meetings with all managers with whom we plan to invest and submit them to a rigorous due diligence process. Once invested we monitor and review performance on an ongoing basis.

The portfolio will be constructed on a rating of 4 as classified on the 1-7 CESR risk scale. However, when invested at either end of the control ranges the rating may vary between 3 and 5.

Sales Aid

- Access to skills and experience of award winning investment manager David Miller and his team of investment professionals
- A focus on wealth preservation and capital growth
- Long only investment strategy
- Active investment management
- Exposure to UK and global equities as well as multi asset investments
- Multi asset approach with exposure to cash, fixed interest, equities & alternatives (household names/daily tradable)
- All aspects of asset allocation are closely monitored by the management team
- Focus on major developed economies
- Weekly dealing
- Fully regulated UCITS IV structure
- Derivatives will not be used

Asset Allocation Example



Basic Objectives

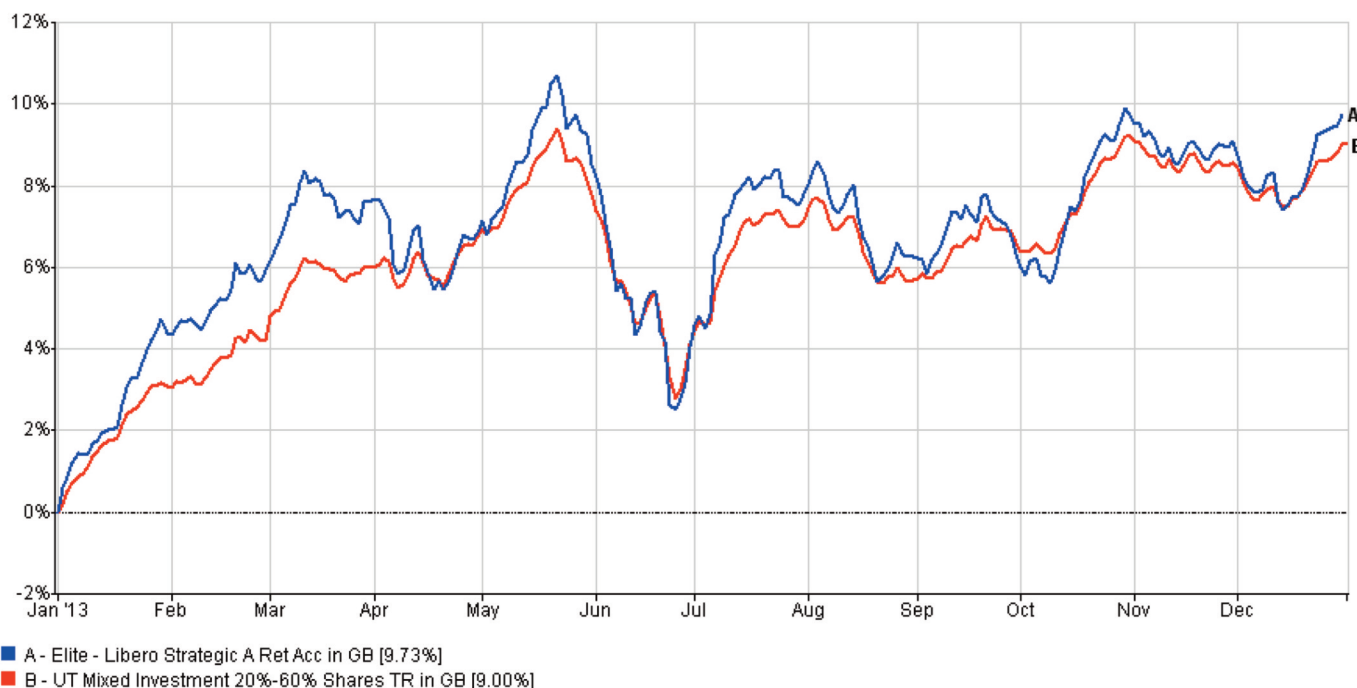
Objective	To protect and grow capital through exposure to a diversified and broad range of asset classes
Investment horizon	Minimum of three years
Risk	Medium
Asset classes	Primarily invested in fixed interest, equities and Alternative Asset Classes
Benchmark	Composite benchmark comprising a range of asset classes

Contact Details

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Nexus Global Solutions Portfolio

Performance Graph



Source: Financial Express

The above performance graph shows the performance of the UK Libero Strategic Fund run by David Miller. The asset allocation of the UK Libero Strategic Fund will differ from the Nexus Global Solutions Portfolio but does represent a close comparison.

About the manager



David Miller

David, 55, has an impressive 32 year track record. Former Managing Director at JP Morgan Private Bank, London and Head of Investments for the British Isles at the Royal Bank of Canada, he has won the City of London Wealth Management Award for Best Performing Fund for the Libero Cautious fund in both 2012, and 2013. David's wealth of experience and knowledge provides the knowledge that clients' investments are in exceptionally safe hands.

- David's approach to investment combines strong valuation disciplines within a long-term strategic framework, together with a willingness to adjust asset allocation and stock selection in response to short term market opportunities. The Portfolio is not constrained by one particular investment style such as growth or value, but instead the manager believes that the best returns are achieved by correctly positioning the portfolio to benefit at all stages of each economic cycle.
- David has the mandate to search out value in all asset classes and so is well-placed to judge the relative merits of a wide range of investment opportunities. In addition to an understanding of economic conditions, close attention is paid to individual companies. High conviction ideas are supported by a combination of quantitative analysis, in-house research and company visits.



WINNER
Wealth Management Awards
Best Performing Fund
Libero Cautious 2013



WINNER
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Libero Cautious 2012



WINNER
Best Cautious Portfolio
2013



WINNER
Investment Performance
Defensive Portfolios
2012



Alastair Buchanan - Intermediary Business Development Director

Alastair started his career in 1981 as a Shipbroker with Giles Pritchard-Gordon and Co before joining Johnson Fry 1989 (now Legg Mason) in the sales and marketing department. In 1998 he set up Seaforth International Ltd, a third party marketing company with a focus on hedge funds. Seaforth has worked closely with Quilter Cheviot for three years and in 2012 Alastair joined Quilter Cheviot as Business Development Director.



Darlene Bowen - Intermediary Relations

Darlene began her career at St George bank in Sydney, Australia before joining the Woolwich as a Financial Adviser. Between 2005 and 2007 she was the operations director of Tax Invest Group financial advisers before moving to Arbuthnot Latham as a Business Analyst. In 2009 Darlene joined Iveagh Wealth Limited as Head of Investor Services before joining Quilter Cheviot in March 2012. Darlene is responsible for Intermediary relations, working with platforms and the IFA market.