

Portfolio Aim

The Nexus Global Dynamic Portfolio is an actively managed, globally diversified, equity portfolio. The aim is capital appreciation.

Why Equities?

The case for investing in equities is now more compelling than ever, supported by the following factors:

- Equities are under-owned and should benefit on the back of global economic growth and low interest rates
- Equities are attractively priced relative to fixed interest and should outperform in a reflationary world. Bond yields are low and companies continue to issue debt
- Carefully selected equities will benefit in an ever changing world, where technological advances continue and the world becomes more connected
- Equities offer investors the ability to participate in the faster growing emerging market economies
- Equities are well placed to benefit from steady economic growth, as it boosts corporate earnings. Companies are cash rich which in turn provides opportunities for sector consolidation and cash returns to share holders

Quilter Cheviot is an advocate of active investment management and applies this to both its strategic asset allocation and security selection. As the gap between winning and losing securities expands, a passive approach is not adequate.

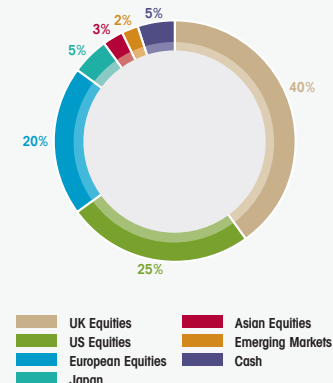
Our investment framework combines the skills of a dedicated equity research team with those of experienced investment managers, to provide the optimum return for our clients. We generate investment ideas from across the globe, researching and undertaking due diligence to validate opportunities, which are subsequently regularly reviewed. We believe that the best results come from a mix of styles adapted to the market cycle.

The portfolio will be constructed on a rating of 6 as classified on the 1-7 CESR risk scale.

Key Benefits

- Capital growth through investments in global equity markets
- Exposure to major developed economies and selectively to growing economies
- Active investment management
- Highly liquid equity portfolio
- Long only investment strategy
- Access to skills and experience of award winning investment manager David Miller, Nick Davis and their team of investment professionals
- All aspects of asset allocation are closely monitored by the management team
- Weekly dealing
- Fully regulated UCITS IV structure
- Derivatives are not used

Asset Allocation Example



Basic Objectives

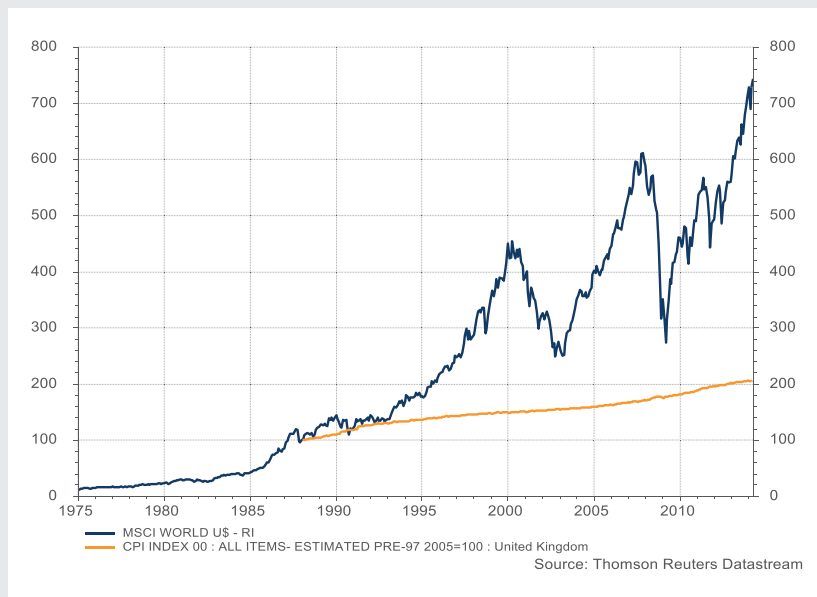
Objective	To grow capital through a portfolio of global equities
Investment Horizon	Minimum of three years
Risk	Medium - High
Asset Classes	Primarily invested in global equities
Benchmark	Composite global equity benchmark

Contact Details

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Nexus Global Dynamic Portfolio

MSCI World - \$ (Total Return Index) vs. CPI Index (Rebased to 100)



“The nominal worth of £100 invested in equities at the end of 1899 was £2,214,856. The same investment in gilts was worth £30,591 and in T-Bills £20,363. When adjusted for inflation, the equity fund is worth £28,386, the gilt £392 and the cash fund £261.”

Equity Gilt Study 2014, Barclays

About The Managers



David Miller

David 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 provides the knowledge that clients' investments are in exceptionally safe hands.



Nick Davis

Nick began his career managing money for individuals in 1987 at Kleinwort Benson, moving in 1999 to Credit Suisse Private Bank. In 2005, he began advising institutional clients specialising in charities at CCLA and pension funds at PSolve before returning to managing portfolios for individuals, pensions, trusts and charities at Williams de Broe, recently acquired by Investec. Nick joined the company in 2012 and manages portfolios on behalf of individuals, charities, pensions and trusts.



WINNER

Investment Performance
Growth Portfolios 2014



WINNER

Best Cautious Portfolio
2013



WINNER

Citywire Wealth Manager
Balanced Portfolio 2012



WINNER

Citywire Wealth Manager
Best Overall Large Firm 2013



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 Arbutnot 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.

Investors should remember that the value of investments, and the income from them, can go down as well as up and that past performance is no guarantee of future returns. You may not recover what you invest.