



# Momentum Investment Solutions & Consulting

March 2024

# What sets us apart?

## Tailored advice

Our advice always **starts and ends with your goals in mind**. We tailor our approach to each of our clients' circumstances. Our goal is to give you a clear framework that is also practical.

## Leading proposition

Our clients include some of the largest pension funds in the industry. Because of our relationships, we have unparalleled access to new investment ideas. We have a **thoughtful and innovative approach**.

## Commitment to relationships

We look to **collaborate with our clients to build strong, long-term relationships**. Our clients view us as an extension of their in-house team. Our fixed fee approach means you have unlimited access to our team.

# Who we are

Momentum Investment Solutions & Consulting was established in 2014 by a team of experienced investment consultants to provide independent advice to UK pension schemes, and we currently advise on c.£16bn of assets\*.

The Partners came out of one of the global consulting firms precisely so that we could focus on putting clients' needs first. The Partners are supported by a team of Associate Consultants and analysts.



Peter Hall, FIA  
Partner



Raj Goswami, CFA CAIA  
Partner



Fraser Price, CFA  
Associate Consultant



Jonathan Adamson, CFA  
Associate Consultant

\*As at January 2024.

# Our investment philosophy

## We take into account:

**Fundamental rationale** any asset class is only worth adding if there is a good fundamental rationale for it to generate an excess return relative to risk-free assets.

**Low risk of fundamental impairment** mark-to-market risks should be recovered by patient investors, whereas losses due to default are permanent.

**Predictable cashflow profiles** improve cashflow management and return forecasting.

**Predictable expected returns** provide greater confidence of achieving the target return, simplifies comparison between different assets, and helps to scale allocations effectively.

**Liquidity and complexity premium** attractive risks to take if they are rewarded.

We seek to **diversify sources of return and/or sources of risk**, rather than simply diversify capital allocations.



# Our services

We provide advisory services across all aspects of investment policy management



## Investment strategy

*(objective setting, risk budgeting, Asset Liability Modelling)*



## Portfolio construction



## Responsible investment advice and reporting



## Manager research, selection and monitoring



## Bespoke mandate design



## Transition co-ordination

# Contact us

## Investment Solutions & Consulting

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### **Important notes**

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*Partnering with large institutional investors to help them achieve their goals*

