

# Iveagh Core Portfolios

Investment solutions to preserve and grow wealth



In 1886 Edward Guinness, first Earl of Iveagh, established the Iveagh Trustees as a family office to preserve the fortune that came from the flotation of the family's brewing business.

During 2005, the Iveagh Trustees evolved into Iveagh Private Investment House.

Guided by a philosophy of continuity with change, successive generations of the Guinness family have been involved with preserving and growing wealth.

“Today Iveagh provides an innovative combination of long-term wealth preservation techniques and modern institutional investment expertise for wealthy individuals and families seeking to preserve and grow their financial assets.”

*Edward Guinness, 4<sup>th</sup> Earl of Iveagh, Chairman of Iveagh Ltd*

# A Century of Investment Experience

Finding a safe and steady home for your investments is one of the most important financial decisions you will make. Preserving and growing your wealth over the long term requires the skills of an investment firm that is just as focused on providing healthy returns as it is on preserving capital for the next generation. This same approach has seen us navigate the 2007–09 credit crisis successfully, preserving and growing our family’s capital when many investors were suffering large losses.

Backed by more than a century’s experience of managing the Guinness family’s private wealth, Iveagh brings the latest techniques to managing investments. Iveagh has designed the Core Portfolio range as a long-term wealth management solution for today’s rapidly changing financial landscape.

## Why Iveagh?

- An established pedigree of preserving and growing wealth over successive generations.
- A rigorous and systematic investment process that combines modern asset allocation processes with active risk management techniques.
- An experienced investment team with a proven track record of investing successfully through several business cycles.
- An ability to preserve long-term wealth by avoiding the worst periods of performance in financial markets.
- A robust technology platform and operational infrastructure to support the investment management process.



# Global Multi-Asset Investing

Diversifying a portfolio across global markets is important. However, the key to creating and sustaining wealth over the long term is to be invested in the right assets at the right time. To make these decisions you need investment managers with a proven track record of investing successfully through several business cycles on a global mandate.

The Iveagh Core Portfolios use an investment strategy that blends asset classes according to financial and economic conditions. In this way the portfolios are positioned appropriately to capture growth when the markets are rising and preserve wealth when they are falling.

## Investment strategy

Iveagh bases its asset allocation and investment decisions on analysis of the global economy and financial markets using the following five inputs:

- **Leading indicators:** quantitative and statistical methods predict the level of global economy activity over the next three to six months.
- **Econometric models:** measurements of the daily health of the global economy provide signals of likely fiscal and monetary policy changes and how these will affect asset class performance.
- **Market intelligence:** Iveagh's relationships with sovereign wealth funds and large hedge funds provide crucial information about global investment patterns.
- **Valuation:** measuring the relative value of securities compared with the past indicates whether they are reasonably priced, overbought or oversold.
- **Technical analysis:** the medium- to long-term performance trends of financial assets provide useful insights about when to invest.

# Preserving and Growing Wealth

## Investment process

- Working with your financial adviser, you determine an investment strategy that can meet your long-term financial goals and objectives.
- Your financial adviser will work with Iveagh to make sure your selected portfolio matches your financial objectives.
- The portfolios capture exposure to the markets efficiently using ETFs, managed funds and the shares of publicly listed companies.
- By adapting the balance of equities, bonds, commodities, property and cash continually according to changing market conditions, Iveagh's investment professionals provide a long-term wealth management solution.

Iveagh's Core Portfolio range offers a choice of risk and return profiles. So whether you are a cautious investor, more adventurous or somewhere in between, Iveagh manages your investment portfolio to meet your financial goals and objectives. Regardless of your appetite for risk, you can be sure that Iveagh will aim to preserve your capital should the downside risks in financial markets outweigh the upside potential.

Iveagh work closely with a number of professional investment advisers to deliver portfolio returns that match their clients' objectives. The Iveagh Core Portfolios are suitable as a standalone portfolio or as part of an integrated investment strategy. For more information contact your financial adviser.

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Iveagh's Core Portfolios give all investors access to the family office investment experience.

Contact your financial adviser for more information about the wealth management solutions available through Iveagh's Core Portfolio funds.



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