

FAIRBAIRN CAPITAL
ELITE INVESTMENT TOOLS



In the complex world of investment, there are those who have the ability to glimpse beneath the surface and find true balance in all their pursuits. It's about having a deeper understanding of circumstances... adopting a measured approach, interrogating, dismantling, asking questions, considering more than just the bottom line and finding simple solutions to the most complicated problems.

Now that's real intelligence – Fairbairn Capital intelligence.

PROVIDING ELITE INVESTMENT DIRECTION

Usually investment models are centered around risk profiling of the client. Risk profiling, however, is limited in that it typically only measures short-term fluctuation and volatility of investments. The Elite range of funds utilises an evolved investment model that has been developed to take both current thinking and new approaches to modelling into consideration. The investment model takes into account the investment objective of the client in order to truly understand their needs rather than simply investment volatility in isolation.

Risk ratings of funds are typically subjective and don't disclose the methodology by which the rating was attained. There is also no set industry standard that rates all funds consistently. A new assessment model was formulated for the Elite range, enabling advisers to offer a comprehensive solution to clients. The new Elite investment model is based on both investment risk and investment objective.

There are two key differentiators:

With the Elite investment model, investment objectives are defined by the need for:

- income;
- Capital Growth vs. Capital Security; or
- a combination of the two.

Two-pronged investment approach

The new investment model provides two options for investing in the Elite range of funds in order to attain the customised investment portfolio:

- **SOLUTION FUNDS**

Specific funds are recommended based on a client's objective profile.

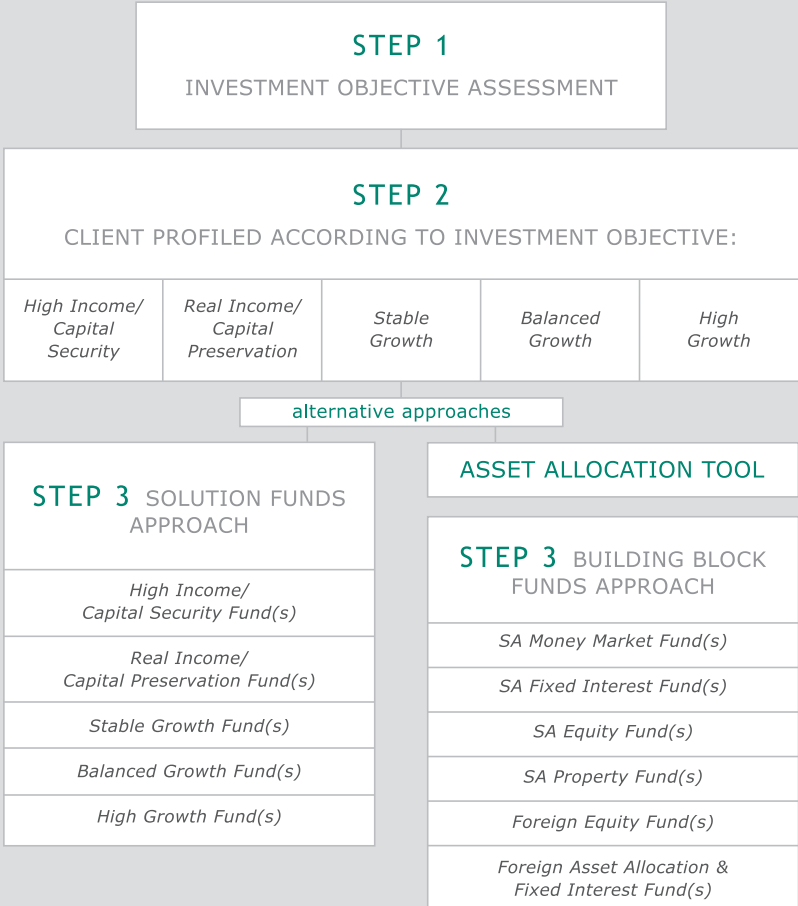
- **BUILDING BLOCK FUNDS**

A solution is constructed using 'building blocks' and guidance as to what the solution should look like.

Elite online modelling tool

An online version of the Elite investment model enables advisers to assess and match existing Fairbairn Capital clients' objective profiles by simulating switches and additional investments into Elite funds.

Elite investment model diagram



(Solution Funds may also be used in portfolio construction)

To invest, speak to your Old Mutual financial adviser,
your broker or phone 0860 WEALTH (0860 932 584)
or email advice@oldmutual.com

www.fairbairncapital.com

Please note: The opinions expressed in this brochure are not intended to serve as investment advice and should not be used in substitution for the exercise of own judgement.



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