



TYNDALL

Partnerships

## Partnership: *noun*

A relationship in which two or more parties work together to achieve better outcomes

### Investment Propositions built to suit your business

At Tyndall Partnerships our priority is to provide a customised investment solution designed specifically around your business.

In an industry which is unrelenting in its drive towards benchmarking, standardisation, and defensive M&A, we have made it our purpose to provide a differentiated investment experience for advisers.

Rather than simply offering a prefabricated model that has been built for corporate convenience, we tailor the investment to suit your agreed mandates, risk appetites, ESG preferences and benchmark in order to deliver a specified outcome.

Most importantly, we provide a differentiated investment proposition suited to your clients and specific to your business.

### Why we are different (to an MPS)?

Portfolios are tailored to each financial planning business and not on a pre-determined static model



You are involved in the investment process and can shape the investment proposition around your business



We will deliver your bespoke portfolios on a platform that is best suited for you



You can offer your clients a unique product no other firm can provide



You get unlimited access to the investment expertise of Tyndall Investment Management



We offer a personalised service and can meet with you and your clients on a regular basis to discuss your portfolios



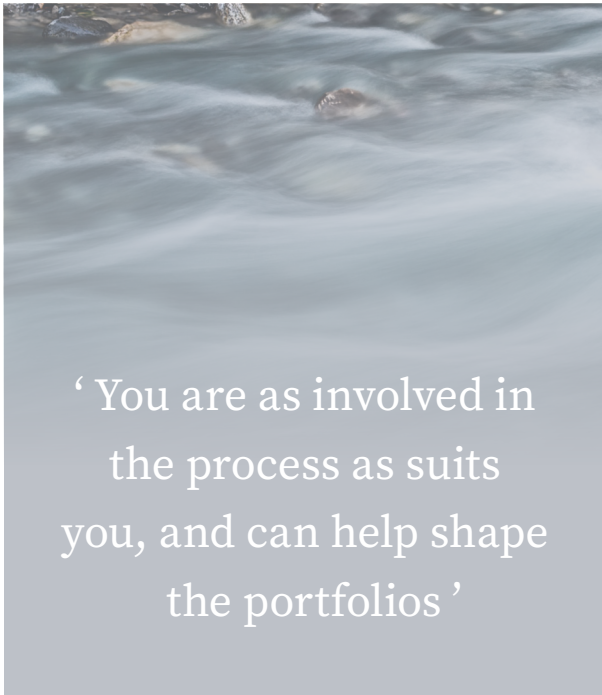
You maintain control of the client experience



A solution without having to bear the costs and regulatory burden associated with having an in-house investment proposition.



Our objective is to work alongside you, acting as your in-house investment expertise



## How we work with you

Through a series of discovery conversations, we develop a complete understanding of your business model and client needs, setting out your objectives for the investment mandates. As a client, you are very much part of the process and can help shape the portfolios to your business requirements. At the beginning of our engagement we will:

Establish the number of models required

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Set the desired level of equity risk

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Agree the required level of ESG exposure within each portfolio

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Decide the reference points used to manage performance

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Define the style of portfolios – active, passive, a blend of both or OCF capped

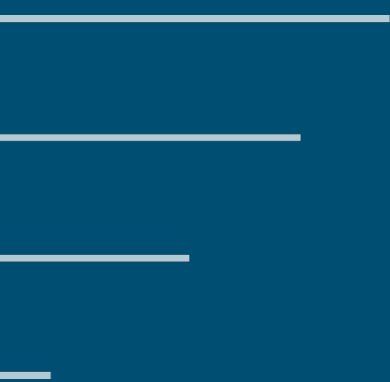
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Agree on platform availability

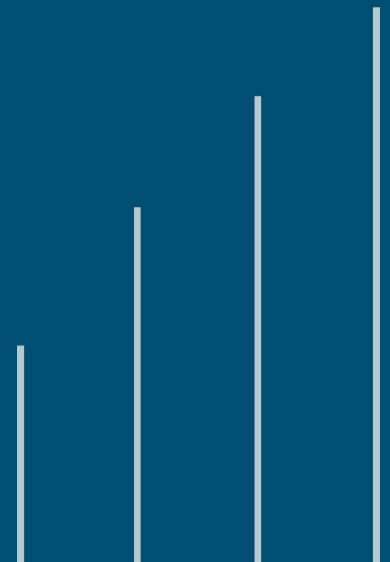
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Throughout our partnership we will regularly review these points to ensure that the products remain fit for purpose for your clients' needs.

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‘ Throughout our partnership we will regularly review the characteristics and construction of your portfolios to ensure that they remain fit for purpose for your clients needs ’



# Unique Algorithms

## Our Investment Process

*Tyndall Compass* – our proprietary modelling system – sanctions the design and risk controlled framework of the portfolios agreed and discussed for your business using unique algorithms.

We then apply the tactical asset allocation that is underpinned by our internal valuation screening and complemented by a qualitative overlay

The portfolio is then constructed using our approved panel of investments that are sympathetic to the needs of your business.

### Strategic Asset Allocation

- 1 Utilise *Tyndall Compass* to design a SAA capable of delivering objectives
- 2 Risk classification determined by equity allocation and volatility parameters
- 3 Back tested to offer comfort of achieving prescribed outcomes

### Tactical Asset Allocation

- 1 Adopt a semi-flexible TAA permitting tactical discretion over the SAA
- 2 Influenced by an objective proprietary valuation screen
- 3 Inputs from the Investment Committee and Tyndall investment professionals

### Portfolio Design

- 1 Investment selection from our approved investments panel to remove emotion
- 2 Select only vehicles most appropriate for the mandate
- 3 Pragmatic on investment structures in order to best achieve outcomes

***Tyndall Compass* ensures risk controls are present at every stage of the process**

# Structured around your business and your clients' requirements

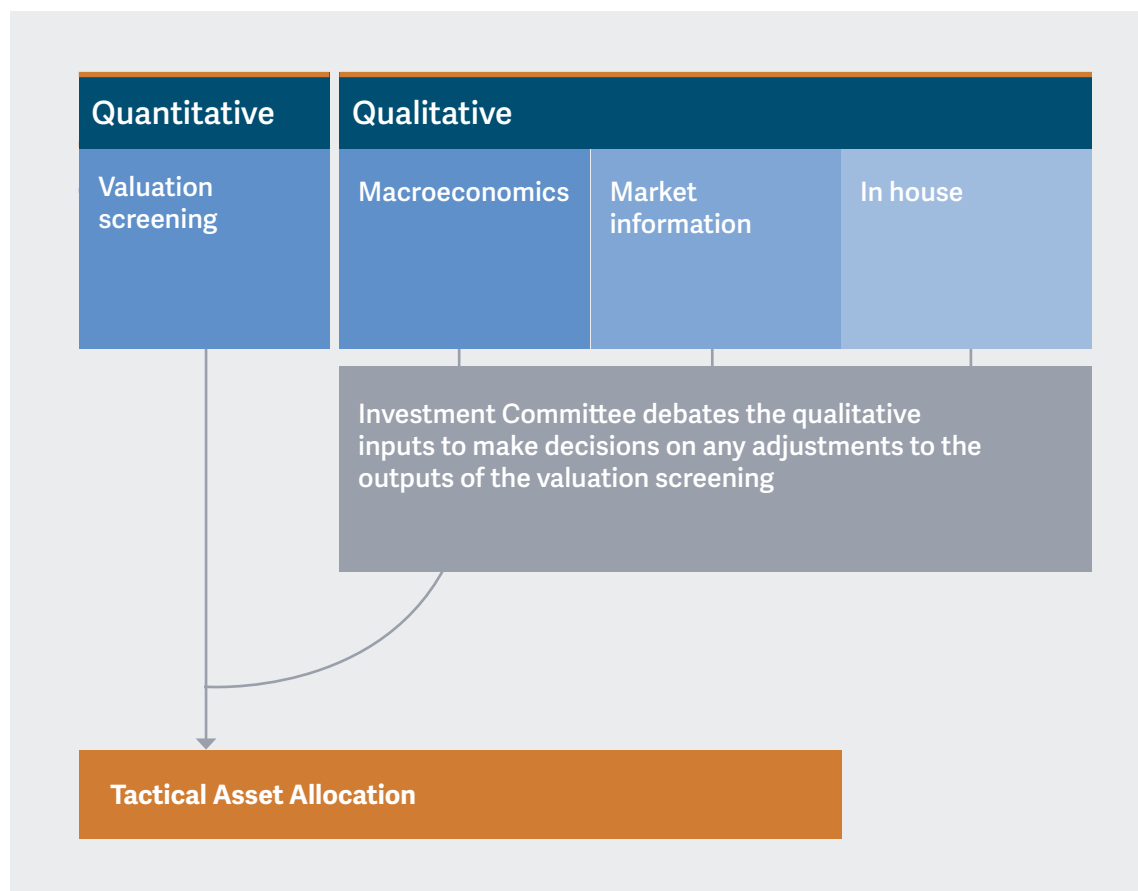
## A two-lens approach to portfolio construction

By using a combination of quantitative and qualitative analysis *Tyndall Compass* blends objective analysis with the views of the Investment Committee (IC).

The role of the IC is to assess the quantitative inputs from *Tyndall Compass* through a qualitative lens and make any appropriate adjustments to the Tactical Asset Allocation.

The make up of the IC is based on your desired level of input and influence.

Whilst prescribed by Strategic Asset Allocation, and influenced by Tactical Asset Allocation, portfolio design based on fundamental analysis is structured around your business and your clients' requirements.



Through regular engagement and ongoing review between both parties, we ensure your portfolios are kept on track and continue to meet your business mandates.



# We can create pure ESG portfolios for clients

## Sustainable mapping

We group every investment into one of four categories: Traditional, Ethical, ESG and Impact. This enables us to map the sustainable footprint of each of our portfolios as a standard part of our process.

Depending on your priorities, we can create pure ESG portfolios for clients who require 100% exposure to Ethical, ESG risk-mitigating or Impact investments.

1

### Traditional

#### Traditional investing

Financial returns regardless of ESG

2

### Ethical

#### Ethical investing

Avoiding contentious industries, 'negative screening' in pursuit of financial returns

3

### ESG

#### ESG investing

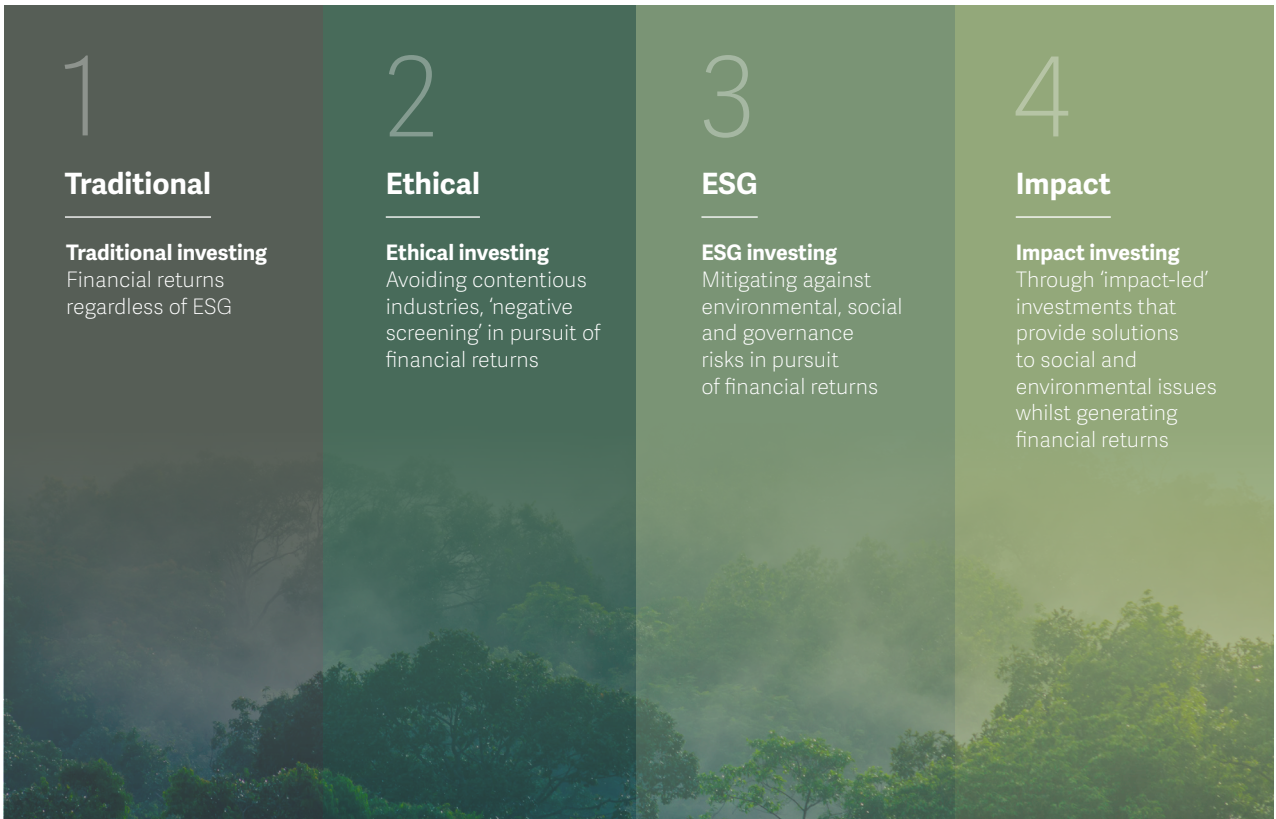
Mitigating against environmental, social and governance risks in pursuit of financial returns

4

### Impact

#### Impact investing

Through 'impact-led' investments that provide solutions to social and environmental issues whilst generating financial returns



# Active management delivered in a manner that suits your business

## Working with us

Suite of portfolios designed around your business

A service-led proposition with regular engagement

Unlimited access to Tyndall Investment Management

Greater flexibility than an off-the-shelf outsourced solution

Sustainable mapping for every model portfolio

## About Tyndall

Tyndall is a forward-looking, dynamic investment management company with a sole focus: to provide genuine high-conviction, high-performance active management.

In an industry which is unrelenting in its drive towards benchmarking, standardisation, and defensive M&A, we have made it our purpose to provide a differentiated investment experience for advisers.

Rather than providing prefabricated portfolios designed for corporate convenience over client outcomes, we actively look for solutions that benefit our clients, strictly refusing to follow a one-size fits all approach. With Tyndall Partnerships our highly skilled and experienced investment managers will work with you to build a customised investment proposition that fits seamlessly into your business model and aligns with your client needs/outcomes.

As an independent and staff-owned boutique our interests are fully aligned with our clients. We provide an open-door policy, offering you access to our investment teams to ensure transparency and accountability and look to establish strong long-term relationships based on trust, respect, and openness.

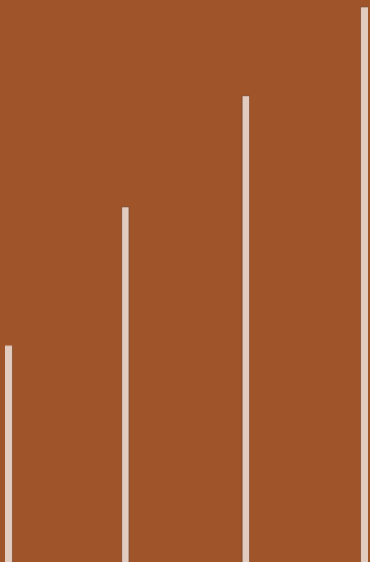
**Capital at risk:**  
The value of investments can fall as well as rise and you may not get back the amount you have invested.

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‘ From initial  
implementation to  
hitting your long-term  
goals, we’re committed  
to being your steadfast  
partner and flexing  
as your needs change  
along the way ’



## Get in touch

If you'd like to find out more, please get in touch for a no-obligation conversation.

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