# Alan Pitchforth Creative Director

Portfolio

### Employment

May 2023 – Present **Freelance Creative Director** Clients include: Saas Business, Marketing **Agencies, Financial & Private Clients** 

2018 – 2023 **Creative Director** Eric Sturdza Investments

2016 – 2017 **Creative Director** Cognito Media

2013 – 2016 **Creative Director & Partner Peregrine Communications** 

2002 – 2003 **Studio Production Manager Advanced Production Services** 

March 1998 – January 2018 Founder & Creative Director Kamilian Design Agency Notable Positions – Brand Ambassador for The Sovereign Group & Sovereign Art Foundation

1995 - 1998 **Co-Founder, Creative Director** & Product Designer ProImage Ltd – Hong Kong, China

1994 – 1995 Head of Digital Imaging Department & Staff Photographer The Eastern Express Newspaper Hong Kong, China

1990 – 1993 Systems Manager & Senior Retoucher Colour Systems (now borngroup.com)

1989 – 1990 **Photo Retoucher Rapida Graphics** 

1986 – 1989 Master of Typography & Composition Modern Text Typesetting

# **Alan Pitchforth**

A comprehensive explanation of employment and education can be found on my LinkedIn profile.

#### Education

#### Personal

2023 **Social Media Marketing Course Future London Academy** 

2022 - 2023 **Compliance & Cybersecurity Courses Compliance Training Products, Bob's Business** & Thornbridge Investment Management

2016 Leading for Creativity Course IDEO U

2015 – 2016 **Digital Marketing Leadership Google – Squared Online** 

2006 - 2008 **Photography Course University of Westminster** 

2002 - 2004 **Directing Course University of the Arts London** 

2001 **TV Directing, Editing & Production** National Film & Television School

2001 Interactive Multimedia – **Complete Production Course University of the Arts London** 

1998 – 2001 **BA Communications & Media Studies** London Metropolitan University

Website Design & HTML Programming **University of the Arts London** 

A/O & O Levels Sweyne Park School Email alan@kamilian.com

Mobile +44 7399 770455

Address 48C Oakington Road Maida Vale O London W9 2DH

Nationality **British** 

Social

in alan-pitchforth www.alanpitchforth.co.uk

# **Alan Pitchforth**

**Creative Director** 

### **Personal Statement**

I am a multi-disciplined passionate creative thinker and doer with over 30 years' experience of generating ideas for industry. I explore and develop ideas into visual concepts that communicate stories and shape brands into engaging, beautiful and meaningful experiences. Transforming complex briefs and business objectives into compelling visual narratives that people can relate to whilst creating ROI for my clients is part and parcel of what I do best. I pride myself on being valuable to the success of others and in helping with their growth and business objectives.

My knowledge combines creativity with empathy, research and analysis, strategic thinking, an eye for great design and attention to detail, and a mature understanding of commerce and business objectives. I deliver focus-driven design and integrated marketing solutions that solve complex problems, build brand awareness, deliver commercial value that fundamentally increase business and provide ROI in the long term.

I keep up-to-date with a rapidly changing digital landscape and thrive on creating communications for all environments and audience types.

My experience spans a diverse range of clients from startups to global multi-billion dollar brands such as Brevan Howard, ESPN, S&P Global, Amnesty International, Euroclear and the Sovereign Group. Sectors include Financial Institutions, leading FinTech companies, Hedge Funds, Asset Managers, Saas firms, digital marketing platforms, ecommerce as well as retail and brochureware clients.

I see myself as a positive, resourceful, inspirational, fun-loving, collaborative team leader and player with a proven ability to meet deadlines in fast-paced environments with creativity, quality and precision.

### What Keeps Me Going

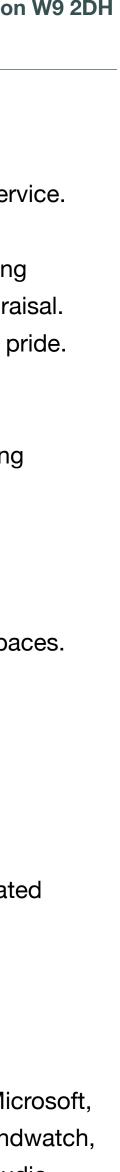
- Helping others creatively to achieve their aspirations by providing the highest level of service.
- Understanding needs and exploring ideas that turn briefs into powerful visual stories.
- Integrity. Taking pride in the work and service provided, building relationships and helping businesses to thrive. "Their success is my success". Repeat business and positive appraisal.
- Empowering, leading and inspiring people to produce their best work with passion and pride.
- Working hard to see projects through from concept to delivery, on time and on budget.
- Being concise and targeted forming clarity with a focus on impact and value.
- Getting to know a client's business and audience mindset. Understanding and visualising what's needed to obtain success, growth, awareness, stability and ROI.
- Mentorship and management and inspiring others around me.
- Rolling up my sleeves and not shying away from problems I believe I can solve myself.
- Encouraging others to think differently and come up with better authentic solutions.
- Working on a mix of touchpoints covering print, video, mobile, web, social and event spaces.
- Passion for simple design, elegant interaction, sharp details and pixel perfection.
- Grounding my thinking and turning big ideas into things that work in the real world.
- Listening. Learning. Participating. Inspiring. Achieving. Having fun along the way.

### **Specialities**

Creative direction, branding, conceptual thinking, user-centered experience design, integrated comms, artificial intelligence, advertising, print and digital design, typography, video and photography.

### Proficient in a diverse range of Software

Adobe Creative Suite, ChatGPT, Sketch, Invision, UXPin, Wireframing, OmniGraffle, iOS, Microsoft, Marketo, HubSpot, Salesforce, Social Media Platforms, WordPress, Google Analytics, Brandwatch, ClickTale, HotJar, CMS, CRMs, Hootsuite, Slack, Mailchimp, Basecamp, Asana, Video & Audio Editing Software, as well as drawing / sketching on paper.



# **Email Marketing at its Best** – ProFundCom

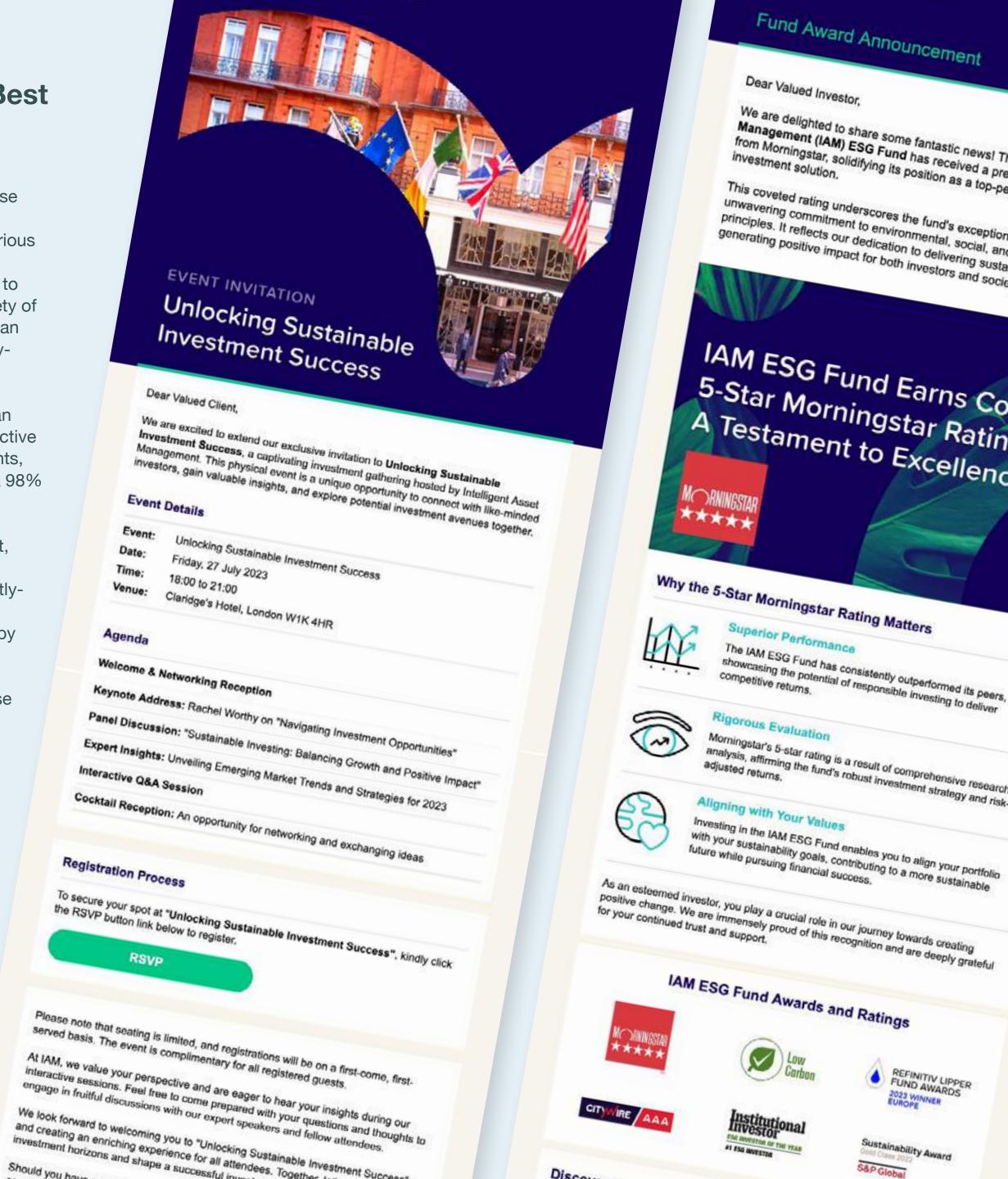
Creation and implementation of a set of email templates and graphics to showcase the capabilities of using ProFundCom's digital marketing platform to promote various scenarios a fund management company may require. The templates are currently to demonstrate to potential clients the variety of ways in which the email marketing tool can be utilised to create impactful, beautifullydesigned emails.

As part of the campaign, I appeared as an expert speaker in a webinar named "effective email marketing" to 250 hedge fund clients, resulting in a 85% attendance rate and a 98% engagement rate.

Resulting in an uptake in product interest, a substantial increase in leads and new collaborations with leading CRMs to jointlypromote the benefits of integrating the ProFundCom platform with CRMs used by financial companies.

I am currently helping businesses that use the platform to redesign their marketing templates in order to ensure effective engagement with the email campaigns.

Should you ?



# Fund Award Announcement

We are delighted to share some fantastic news! The Intelligent Asset Management (IAM) ESG Fund has received a prestigious 5-star rating from Morningstar, solidifying its position as a top-performing sustainable This coveted rating underscores the fund's exceptional performance and its unwavering commitment to environmental, social, and governance (ESG)

principles. It reflects our dedication to delivering sustainable growth and generating positive impact for both investors and society.

IAM ESG Fund Earns Coveted 5-Star Morningstar Rating -A Testament to Excellence



# uperior Performance

The IAM ESG Fund has consistently outperformed its peers, showcasing the potential of responsible investing to deliver

Morningstar's 5-star rating is a result of comprehensive research and analysis, affirming the fund's robust investment strategy and risk-

Investing in the IAM ESG Fund enables you to align your portfolio with your sustainability goals, contributing to a more sustainable future while pursuing financial success.

Disc

A REFINITIV LIPPER FUND AWARDS 2023 WINNER EUROPE Sustainability Award S&P Globa

# icn intelligent asset management

# Exclusive Webinar Invite

Dear Valued Client,

We hope this email finds you well. At IAM Investments, we are excited to invite you to an exclusive webinar where you can unlock the immense potential of the IAM ESG an exclusive webinar where you can unlock the immense potential of the terms and the statistical stati esteemed fund manager, will provide invaluable insights into sustainable investing and hour the LAM COO Fund can allog traits control on allog traits control to the traits traits to the traits of th how the IAM ESG Fund can align your financial goals with your values.

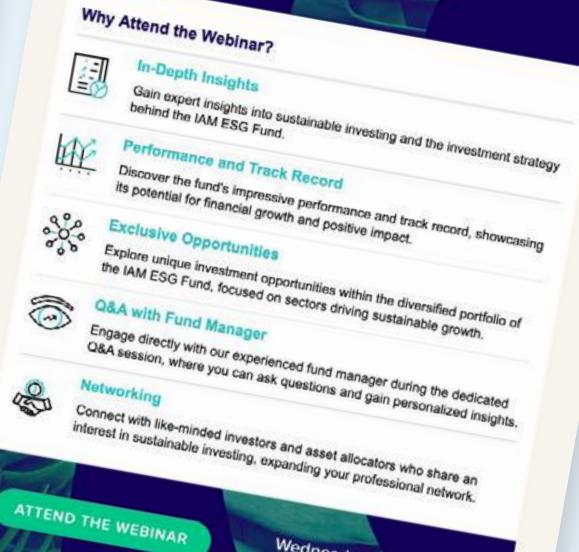
WEBINAR

# Unlocking Sustainable Investment Success Wednesday, 5th June 2023 10:00 - 11:00 BST

ATTEND THE WEBINAR

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Ser.



Wednesday, 5th June 2023 10:00 - 11:00 BST

Overail, ESG investing offers a holistic approach to investing that considers of investments, creating the potential for both fir



# Investor Insights

## Dear Reader,

We are pleased to share an insightful article published in the Financial Times that We are preased to snare an insignitul article published in the mitancial nimes that delves into the transformative power of sustainable investing. This article highlights the arciving importance of Environmental Social and Covernance (ESC) the growing importance of Environmental, Social, and Governance (ESG) the growing importance or environmental, Social, and Soverhande (ESS) considerations in investment decisions. It explores the benefits of sustainable investing and environment the LAM EGO Event as a leading available of driving of considerations in investment decisions, it explores the benefits of sustainable investing and showcases the IAM ESG Fund as a leading example of driving financial investing and showcases the investment to debug into this thought. returns while making a positive impact. We invite you to delve into this thought returns while making a positive impact, we invite you to deive into this though-provoking piece and discover how sustainable investing can unlock long-term value.

# Sustainable Investing: A Paradigm Shift Towards Long-Term Value

Unlocking Value and Impact: The Transformational Journey of Sustainable Investing, authored by Ferrera Trossard, reveals how the integration of Environmental, Social, and Governance (ESG) considerations in investment decisions is reshaping the financial landscape, paving the way for a future of meaningful change and enhanced value creation.



Ferrera Trossard Financial Times

ndon, 05 July 2023 – The global investment landscape is witnessing a profound ft as institutional investors increasingly embrace sustainable investing. ras institutional investors increasingly embrace sustainable investing. ironmental, Social, and Governance (ESG) considerations are no longer seen as val but as essential factors that drive long-term value creation. In this era of that but as essential factors that only iong-term value creation. In this era of the social awareness about climate change, social inequality, and corporate formation formation

nemeu awaremeas about cirmate change, social mequainy, and corporate insibility, sustainable investing has emerged as a transformative force. nable investing is not merely an ethical choice; it has become a prudent y for institutional investors seeking competitive financial returns while actively

ting to a more sustainable future. A growing body of evidence indicates that ing to a more sustainable tuture. A growing body or evidence indicates that ng ESG factors into investment decisions can enhance risk management. new opportunities, and generate resilient portfolios that outperform their

# nable investing is not a trade-off between returns and but a way to achieve both simultaneously."

- es have shown that companies with robust ESG practices often eir peers. Investors who prioritize sustainability are well-positioned to en poors, investors who promise sustainaumly are won-positioned to enefits of long-term growth potential while mitigating risks associated ental, social, and governance issues. This paradigm shift underscores
- sustainable investing is not a trade-off between returns and imr



Why high-interest rates might be

Economist Urshan Phillips argues central banks are increasingly attuned to the risks of overtightening monetary policy.

# Watch the Unlocking Sustainable Investment Success Webinar

Unlocking

Investmen

Chief Strategist Sally Urshing presents Intelligent Asset Management's five-year



Should investors stay and fight for green change — or divest?

This academic study questions whether remaining engaged can often have a

# A Paradigm Shift Towards Long-

Ferrera Trossard reveals how ESG integration reshapes finance for meaningful change and enhanced value.

# INSIGHTS

# Explore More Insights

Market and portfolio insights, webinars & events curated from across our investment teams to help you steer through changing investment landscapes.

# Autil-Asset

ESG investment returns to face a

The factors driving the outperformance of green stocks are changing, our awardwinning managers argue.



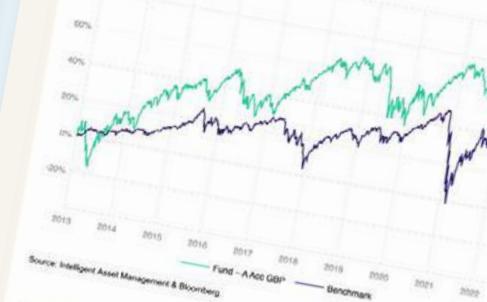
ESG Investing: The Only Way is

ESG represents a form of investing that centres around companies that prioritise ESG factors.

# IAM ESG Fund Update

# ainable Cess .....





# Q1 and Q2 Performance

|                      |                              | Ce                        |                |       |       |       |
|----------------------|------------------------------|---------------------------|----------------|-------|-------|-------|
| 2018<br>2019<br>2020 | 0.23<br>8.53                 | February<br>19.67<br>1.14 | March<br>13.36 | April | May   |       |
| 2021                 | 7.38                         |                           | 3.91           | 14.73 |       | June  |
| 2022                 | 12 17                        | 23.51                     | 7.82           | 22.47 | 14.62 | 16.25 |
| 2023                 | 6.07                         | 20.12                     | 1.26           | 13.13 | 14.75 | 13.53 |
|                      | 6.23                         | 10.92                     | 6.48           | 6.41  | 16.73 | 5.42  |
| (intelligent         | 6.23<br>Maor Management & Bi | 2.14                      |                | 20.16 | 8.94  |       |
|                      | Sumon & Bi                   | gradmoo                   | 12.01          | 0.48  | 5.67  | 17.86 |
| Monthly an           | New York                     |                           |                |       | 4.28  | 11.99 |
|                      |                              |                           |                |       |       |       |

# Monthly and Annual Ave

| *                                   | Allen            | verage | Parts    |              |              |             |
|-------------------------------------|------------------|--------|----------|--------------|--------------|-------------|
| Fund - A Acc GBP                    | 1 M              | onth   | Performa | nce          |              |             |
| Ferformance Refer                   | -                | 0.80   | 1        | Years Ann.   |              |             |
| Scurce: Intelligent Asset Manag     | 1                | 53     | 5.67     |              | 5 Years Ann. | 10          |
| Mariag                              | errort & Routers |        | 4.00     | 1.36<br>4.10 | 0.73         | 10 Years An |
| Calendary                           |                  |        |          | - 10         | 1.47         | 1.6         |
| Calendar Year Pe                    | rforman          |        |          |              |              | 4.75        |
| rund - A Acc Ann                    | TID              | ce     |          |              |              |             |
| Certormance Ref                     | 1.75             | 2022   | 2921     |              |              |             |
| burge: Intelligent Asset Management | 2.15             | 4.27   | 0.85     | 2020         | 2019         |             |
| - son Management                    | & Cityman        | 0.14   | 1.47     | 1.75         | 2.73         | 2018        |
| lline                               |                  |        |          | 2.39         | 4.23         | 8.23        |
| olling 12 Month Pe                  |                  |        |          |              | 1.23         | 3.91        |
|                                     | Torman           | -      |          |              |              |             |

#### 31.05.22 Fund - A An

| Performance Reference                | 0.23                  | - 31.05.21      | 31.05.20<br>- 31.05.21 | 31.05.19   |                        |
|--------------------------------------|-----------------------|-----------------|------------------------|------------|------------------------|
| outroe: Intelligent Asset Management | 0.53<br>& Morningstar | 5.67<br>1.14    | 13.36<br>3.91          | - 31.05.20 | 31.05.18<br>- 31.05.19 |
| Calendar Month Per                   | forma                 |                 | 0.81                   | 14.47      | 1.62                   |
| 2019 8.53 1.14 2.01                  | Apr May               | Jun Jul<br>6.25 | Aug Sen                | 8          |                        |

| 2020    | 8.53<br>7.38          | 1.14  | 3.91  | 14.73 | 14.62 | 16.25 | Ju    | Aug   | 23.79<br>23.79<br>8.94<br>5.67 | 87   |       |      |
|---------|-----------------------|-------|-------|-------|-------|-------|-------|-------|--------------------------------|------|-------|------|
| 2021    | 12.17                 | 23.51 | 7.82  | 13 12 | 14.75 | 13.53 | 4.94  | 14.39 | 23.70                          | Oct  | Nov   | Dee  |
| 2022    | 6.07                  | 20.12 | 1.26  | 6.44  | 16.73 | 5.42  | 1-26  | 6.41  | 8.94                           | 0.42 | 1.54  | 9.44 |
| 2023    | 6.23                  | 10.92 | 6.48  | 20.16 | 8.94  | 17.86 | 26.00 | 20.18 | 5.67                           | 6.09 | 3.43  | 3.70 |
| OLECT I | and the second second | 2.14  | 12.01 |       | 5.67  | 11.00 | 20.96 | 16.06 | 24                             | 8.01 | 14.88 | A.c. |

| IAM ESG Fund Update  | Annualised Sharpe Ratio  |
|--|--|
| June 2022  | Volation   |
| Pudle  | Source: Inselligent Aaset Management & FTSE 190.   |
|  | Kon  |
| Dear Value 1   | Key Highlights   |
| Dear Valued Client,  |  |
| We hope this email finds you well. We are thrilled to share the latest performance<br>update of the <u>Intelligent Asset Management</u> – <u>IAM ESG Fund</u> , our sustainable<br>investment solution. This fund allows you to invest in companies the<br>values while aiming for strong financial returns pairs companies the  | Sustainable Impact   |
| investment   | The IAM Eng  |
| values while aimin. This fund allo   | environmental sector in  |
| We hope this email finds you well. We are thrilled to share the latest performance update of the <u>Intelligent Asset Management</u> – <u>IAM ESG Fund</u> , our sustainable investment solution. This fund allows you to invest in companies that align with values while aiming for strong financial returns. Below is a summary showcasing the fund's recent performance, as of 14 June 2023. | The IAM ESG Fund focuses on investing in companies con<br>environmental, social, and governance (ESG) principles. Bi<br>supporting businesses that prioritize sustainability and social<br>responsibility, we contribute to building a better word.  |
| or 14 June as Below is a mat allow   | we contribute a contribute sustained principles p  |
| Annual Perta   | Rigorous ESG Screening   |
| enormance versus p   | Our meticula   |
| Annual Performance versus Benchmark  |  |
|  | Our meticulous ESG screening         Our meticulous ESG screening process ensures that every consumers our strict sustainability criteria. We evaluate the such as carbon footprint, labor practices, and ethical governance         Our meticulous ESG screening         Diverse Portfolio  |
| 50%  | alignment with our vision and and a we evaluate  |
|  |  |
| a gran man   |  |
| when have been her have been been her  | Stock  |
| " why many my my haw   | The IAM ESG Fund offers a diversified portfolio across sectors and geographies. We capture potential growth and innovation in areas impact.  |
| about my with the star   | Inte IAM ESG Fund offers a diversified portfolio across sectors and such as renewable energy, clean technology, healthcare, and social model.      Robust Performance      Our in  |
| V V  | Robust Part  |
|  | Our investment approach combines sustainability goals with<br>competitive financial performance. Through extensive results<br>identify companies with strong growth pole.  |
| the second se  | Competitive financial performance. Through extensive research, we fundamentals.  |
| 2014 2015  | Competitive financial performance. Through extensive research, we identify companies with strong growth potential and solid  |
| 2018 PD17 2018   | WURDIN VISBARI   |
| Pand - A Acc Care 2018 2000  |  |
|  | Trust and transporting   |
| Q2 Performance   | Very appreciate voice  |
|  | returns, and sustainability metrics,   |
| 0.23 Pebruary  | We appreciate We appreciate the second secon |
| B 53 19.67 April   | We appreciate your continued support as a valued investor in the IAM ESG Fund. If<br>you have any questions or require further information, our team is here to assist you.<br>Thank you for your ongoing partnership in driving positive change to<br>Best regards.   |
| 7.38 3.91 14.73 June   | Thank up   |
| 12 17 20 10 7.82 22.47 14.62 16.25   | investments  |
| 6.07 10.92 1.26 13.13 16.73 13.53  | Thank you for your ongoing partnership in driving positive change through sustainable<br>Best regards,   |
| 0.47   | Best regards, Best regards,  |
| 0.48 5.67 11 m   | an sustainable   |
| 4.28 1.54  | Rachel A   |
| Annual Average Performance   | +44 20 The Helations   |
|  | info.uk@profundcom.net<br>Connect on Linkedu   |
| 5.67 Sterre Ann. 5 Years   | Connect on LinkedIn  |
| 1.33 4 m 1.36 10 Years A   |  |
| 4.10 0.73 1.62   |  |
| Performance  | $(f) \bigcirc \bigcirc \bigcirc \bigcirc$  |
|  |  |
| YTD 2022<br>1.75 2021  |  |
| 1.75 -4.27 2021 2020 2019<br>2.15 0.14 0.85 2019   | intelligent asset<br>management  |
| one & Cityway 0.14 1.47 1.75 2.73  | icin milelligent associ  |
| 2.39 4.23 8.23   | managemeet   |
| Performance 3.91   | Interre  |
| 31.05 m  | 207 Rese   |
| -31.05.23 31.05.21<br>0.22 -31.05.22 31.05.20  | Mayfair, London W1B 3HH +44 20 7060 2146   |
| 0.23 5.67 31.05.21 31.05.19  |  |
| 0.53 13.36 31.05.20 31.05.18   | 10/0 14/0 4068   |
| 3.01 3.01  | Intelligentassetmanapement.com   |
| 4.75   | teleninces   |
|  | In Browledge   |
| Dr M   |  |
| 3 14.62 16.25 4.94 Aug Sep Oct   | Figure Disclaimer: This email and any attachments transmitted with it are confidential and intended<br>please notify the sender immediately and delete this email from your purious device device and intended<br>attachments is provided for informational purpose prohibited and your purious devices and intended<br>mail. Past perform   |
| 14.75 13.53 1.26 14.39 23.79 0.42 Nov Dec disclo   | Pliance Disclaimer: This email and any attachments transmitted with it are confidential and intended<br>please notify the sender immediately and delete this email from your surface confidential and intended<br>attachments is provided for informational survey prohibited. If you have received and intended<br>mail. Past perform   |
| 16.73 5.42 6.48 20.16 6.09 2.41 0.41 0.41 0.41   | attachments is or distribution of entry to whom they are   |
| 8.94 17.86 26.96 16.06 24 20.18 5.67 8.01 14.88 0100 Any col   | movice. The serviced for informational delete this email from the addressed. If you have for the   |

#### Financial Times " bouneve both simultaneously." adde-on between returns and

Recent studies have shown that companies with robust ESG practices often Neconi suules nave snown mai companies with robust ESG practices onon outperform their peers. Investors who prioritize sustainability are well-positioned to outperform their peers. Investors who phontize sustainability are well-positioned to capture the benefits of long-term growth potential while mitigating risks associated with potential with environmental, social, and governance issues. This paradigm shift underscores the notion that sustainable investing is not a trade-off between returns and impact but a way to achieve both simultaneously.

The IAM ESG Fund has emerged as a trailblazer in sustainable investing, offering institutional investors a gateway to navigate the complexities of the sustainable investigation in the final features of the sustainable investors and the final features of the sustainable investors and the final features of the sustainable investors and the final features of the sustainable investors of investing landscape. With its rigorous selection process, the fund focuses on investing landscape investing landscape investing landscape investing landscape. With its rigorous selection process, the fund focuses on investing landscape investing landscape investing landscape. investing randscape, with its rigorous selection process, the rund rocuses on companies that exhibit strong ESG practices, financial viability, and the potential for subtainable remeties in the IAM EGG Eucle institutional investigation on all for companies that exmon strong ESG practices, financial viability, and the potential for sustainable growth. By investing in the IAM ESG Fund, institutional investors can align their postfolion with their volume and contribute to positive emitted and contribute to the their portfolios with their values and contribute to positive environmental and social

-35-

Beyond financial performance, sustainable investing enables institutional investors to beyond manicial performance, sustainable investing enables institutional investor actively engage with companies and influence positive change. By integrating environmental, social, and governance factors into investment decisions, investors can drive companies towards responsible practices, shape industry norms, and foster can onve companies iowards responsible practices, snape industry norms, and iose long-term value creation. This engagement facilitates a deeper understanding of risks and onnorthinities. leading to informed investment decisions and a more robust and opportunities, leading to informed investment decisions and a more robust

The benefits of sustainable investing extend beyond financial gains. Investors who The benefits or sustainable investing extend beyond inancial gains, investors who prioritize sustainability demonstrate their commitment to responsible investing and cultivate sustainability demonstrate their communent to responsible investing and cultivate strong stakeholder relationships. By incorporating ESG considerations,

# cumvate strong stakenoloer relationships. By incorporating ESG considerations, institutional investors enhance their reputation, attract like-minded partners, and build "The IAM ESG Fund offers institutional investors a gateway to navigate the complexities of the sustainable investing andscape, aligning portfolios with values and contributing to

he global investment community embraces sustainability, the need for prehensive ESG data and standardized reporting becomes increasingly rtant. Investors are demanding reliable, comparable, and transparent ESG tant. Investors are demanding reliable, comparable, and transparent COG tation to make informed decisions, Collaborative efforts among regulators, auon to make mormed decisions. Conaborative enorts among regulators, ard-setting bodies, and market participants are driving advancements in ESG

are and reporting standards, making it easier for institutional investors to and integrate sustainability factors into their investment processes. able investing is more than just a trend; it is a fundamental shift in how hal investors approach investment decisions. By recognizing the

ectedness of financial performance, environmental stewardship, and social ility, investors can create portfolios that drive positive change and contribute

n, sustainable investing represents a paradigm shift towards long-term on, Institutional investors have a unique opportunity to embrace this shift, SG considerations into their investment strategies to generate inancial returns while making a positive impact on the world. With

IAM ESG Fund Commentary – July 2023

Dear Valued Client,

We are delighted to present the latest monthly investment commentary on the We are delighted to present the latest monthly investment commentary on the intelligent Asset Management (IAM) ESG Fund, our cutting-edge sustainable investment solution. In this commentary, portfolio manager Alice Drayfuss dives into the function and characteristics investing and characteristics into the successful to except and characteristics and characteristics investing and characteristics into the successful to except and characteristics and characteristics into the successful to except and characteristics and characteristics into the successful to except and characteristics and characteristics into the successful to except and characteristics and characteristics into the successful to except and characteristics and characteristics into the successful to except and characteristics and characteristics into the successful to except and characteristics and characteristics into the successful to except and characteristics and characteristics into the successful to except and characteristics and characteristics into the successful to except and characteristics and characteristics into the successful to except and characteristics and characteristics and characteristics and characteristics and characteristics into the successful to except and characteristics and characteristic Investment solution, in this commentary, portiono manager vince oraginas unvesting the fund's innovative approach to sustainable investing and shares valuable insights into the structure valuable.

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# Navigating the Sustainable Investment Landscape – IAM ESG Fund's Stellar Performance in H1 2023

As we tread through the dynamic landscape of sustainable investing, the IAM ESG Fund emerges as a beacon of success, illuminating the path to responsible and rewarding investments. With the first two quarters of 2023 behind us, we proudly present a comprehensive investment commentary that delves into the fund's positive performance, showcasing the remarkable potential of sustainable



## Alice Drayfuss Portfolio Manager

IAM ESG Fund 25 July 2023 5-min read

The IAM ESG Fund experienced a remarkable journey in the first half of 2023. reattiming its position as a leading sustainable investment solution. Amidst the backdrop of an ever-evolving global landscape, the fund demonstrated resilient performance (see Figure 1), generating substantial returns while maintaining a performance commission to anticommental control control

periormance (see Figure 1), generating substantial returns while maintaining a steadfast commitment to environmental, social, and governance considerations. IAM's ESG Fund experienced a remarkable journey in the first half of 2023, non-time investment colution. Amidet in reaffirming its position as a leading sustainable investment solution. Amidst the backdron of an outpression alphal landscape, the fund demonstrated recilient backdrop of an ever-evolving global landscape, the fund demonstrated resilient backdrop of an ever-evolving global landscape, the fund demonstrated resilient

performance, generating substantial returns while maintaining a steadfast nmitment to environmental, social, and governance considerations.

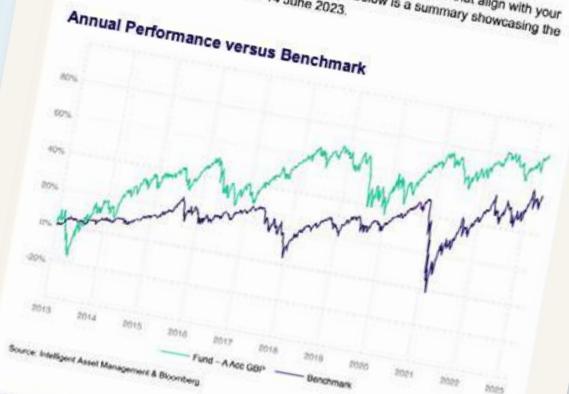
# Figure 1: H1 Performance of the IAM

| 2018            | January                      | February |       |       |              |       |
|-----------------|------------------------------|----------|-------|-------|--------------|-------|
| 2019            | 0.23                         |          | March | und   |              |       |
| 2020            | 8.53                         | 19.67    | 13.36 | April | 200          |       |
| 2021            | 7.38                         | 1.14     | 3.91  | 14.73 | May          | June  |
| 2022            | 12.17                        | 23.51    | 7.82  | 22.47 | 14.62        | 16.25 |
| 2023            | 6.07                         | 20.12    | 1.26  | 13.13 | 14.75        | 13.53 |
| Source: Interne | 16.23                        | 10.92    | 6.48  | 6.41  | 16.73        | 5.42  |
| A house of the  | 16.23<br>Sout Management & B | loombara | 12.01 | 20.16 | 8.94<br>5.67 | 17.86 |

# IAM ESG Fund Update

# Dear Valued Client





# Q1 and Q2 Performanc

|                   |                              | ance           |       |       |       |       |
|-------------------|------------------------------|----------------|-------|-------|-------|-------|
| 2018<br>2019      | January<br>0.23              | February       | March |       |       |       |
| 2020              | 8.53                         | 19.67          | 13.36 | April | May   |       |
| 2021              | 7.38                         | 23.51          | 3.91  | 14.73 | 14.62 | June  |
| 2022              | 12.17                        | 20.12          | 7.82  | 22.47 | 14.75 | 16.25 |
| 2023              | 6.07                         |                | 1.26  | 13.13 |       | 13.53 |
| Source: Intention | 6.23                         | 10.92          | 6.48  | 6.41  | 16.73 | 5.42  |
| ( Tringford       | 6.23<br>Moot Management & Bi | 2.14           | 12.01 | 20.16 | 8.94  | 17.86 |
| Monthly an        |                              | and the second |       | 0.48  | 4.28  | 11.99 |

# Monthly and Annual

34

| and and                           | A                 |        |         |              |              | -0 4          |
|-----------------------------------|-------------------|--------|---------|--------------|--------------|---------------|
| Fund - A Ace GBP                  | Annual A          | verage |         |              |              | 1             |
| Fund - A Acc GBP                  | 1 M               | onth   | renform | ance         |              |               |
| ertormance Rel                    | 4                 | 0.80   | 1 Year  | 3 Years Ann. |              |               |
| Scancer intelligent Asset Mana    | 1                 | 53     | 0.07    | 1.36         | 5 Years Ann. | 10 %          |
|                                   | gerneri & Reuters |        | 4.00    | 4.10         | 0.73         | 10 Years Ann. |
| Calendar Va                       |                   |        |         |              | 1.47         | 1.62          |
| Calendar Year P                   | erforman          | 0      |         |              |              | 4.75          |
| rund - A Acc Ann                  | TID               |        |         |              |              |               |
| rerformance Ref                   | 1.75              | 2022   | 2921    |              |              |               |
| urse: Intelligent Asset Manageman | 2.15              | -4.27  | 0.85    | 2020         | 2019         |               |
| Managemar                         | A & Citywine      | 0.14   | 1.47    | 1.75         | 2.73         | 2018          |
| olling 12 Month Pe                |                   |        |         | 2.39         | 4.23         | 8.23          |
| month Pe                          | rforman           |        |         |              |              | 3.91          |
|                                   | and               | -6     |         |              |              |               |

| Fund – A Acc GBp<br>Performance Reference<br>Source: Intelligent Asset Managem       | 31.05.22<br>-31.05.23<br>0.23<br>0.53 | 31.05.21<br>- 31.05.22<br>5.67<br>1.14 | 31.05.20<br>- 31.05.21<br>13.36 | 31.05.19<br>- 31.05.20<br>10.73 | 31.05.18<br>- 31.05.79 |
|--|---------------------------------------|--|---------------------------------|---------------------------------|------------------------|
| Calendar Month Po<br><sup>36</sup> Jan Feb Mar<br>2018 0.23 19.67 13.36<br>2019 8.52 | erformance                            |  | 3.91                            | 14.47                           | 1.62<br>4.75           |

| 2020     | 7.38  | 20 -  | 3.91  | 22.47 | 14.62 | 18.25 | 100               | Aug   | Sep.                           | 2    |       |                     |  |
|----------|-------|---|-------|-------|-------|-------|-------------------|-------|--------------------------------|------|-------|---------------------|--|
| 2021     | 12.17 | 23.51   | 7.82  | 13 10 | 14.75 | 13.53 | 4.94              | 14.39 | 23.79<br>23.79<br>8.94<br>5.67 | Oct  | Nov   | 0ec<br>9.41<br>3.79 |  |
| 2022     | 8.00  | 20.12   | 1.26  | 10.13 | 16.73 | 5.42  | 1.26              | 6.41  | 80.                            | 0.42 | 1.54  | CAC.                |  |
| 2021     | 0.07  | 10.92   | 6.40  | 6.41  | 8.94  | 17    | 6.48              | 20.18 | 0.94                           | 6.09 | 3.40  | 8.41                |  |
|          | 6.23  | 2.14  | 10.48 | 20.16 | 5.67  | 17.86 | 26.96             | 16.00 | 5.67                           | 8.01 | 14.00 | 3.79                |  |
| SOLMON I |       | and the second se | 12.01 | 10000 |       | 11.00 | 1 m 1 1 1 1 1 1 1 | 10.06 | 34                             |      | 19.88 |                     |  |

## Annualised Sharpe Ratio Annualised Volatility Source: Intelligent Asset Management & FTSE 100.

# Key Highlights



# Sustainable Impact

The IAM ESG Fund focuses on in environmental, social, and govern supporting businesses that prioritiz responsibility, we contribute to build

# 

Rigorous ESG Screening Our meticulous ESG screening proce/

in the fund meets our strict sustainab/ such as carbon footprint, labor practic ensuring alignment with our vision.

# Diverse Portfolio

The IAM ESG Fund offers a diversified / geographies. We capture potential growty such as renewable energy, clean technolr

# ono

Robust Performance

Our investment approach combines austainr competitive financial performance. Through e identify companies with strong growth potentiv



# Transparent Reporting

Trust and transparency are paramount. The IAM regular, comprehensive reporting on ESG perform returns, and sustainability metrics.

We appreciate your continued support as a valued investor in the I/ you have any questions or require further information, our team is h Thank you for your ongoing partnership in driving positive change thr

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pliance Disclaimer: This email and any attachments transmitted with it are confidential any by for the use of the individual or entry to whom they are addressed. If you have monthal any sciosure, copying, or distribution of a label of the providential and and the stick of the second state.

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| ess ensures that every co<br>bility criteria. We evel  | om   |
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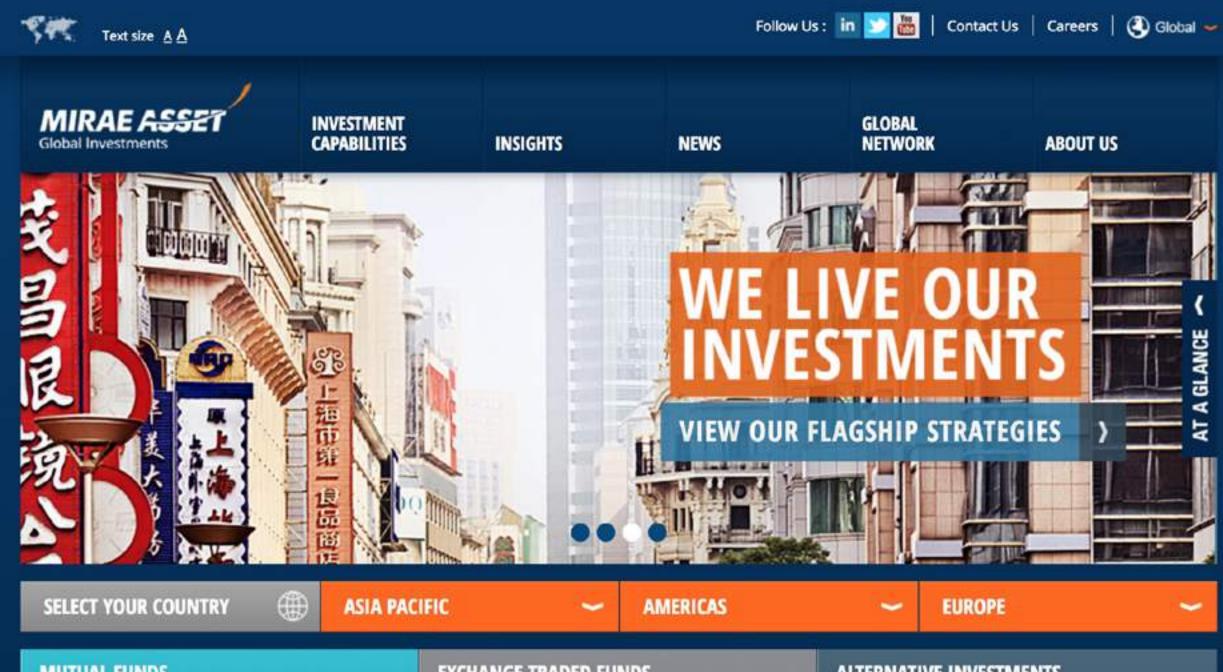
# Mirae Asset Global **Investments Campaign**

Tasked with establishing the brand presence in the UK and Europe of Mirae, the largest Asia-based investor in emerging market equities. Redesigned the UK / HK websites to convey a strong and consistent brand identity, with supporting video, filmed and edited in-house.

Created and managed global brand building and product advertising campaigns across both print and digital in 2014/15.

Produced powerful product and corporate messaging culminating in the development of the 'We Live Our Investments' slogan now deployed as a fundamental aspect of Mirae's brand strategy.

Results: Mirae's core SICAV range total assets under management (AUM) grew from \$150mn to \$1.75bn in 14 months and Mirae has become a recognised brand.



### MUTUAL FUNDS

### EXCHANGE TRADED FUNDS

View our Equity and Fixed Income Funds that have made us one of Asia's largest asset managers.

Browse our suite of 200+ ETFs offered in Canada, Colombia, US, Korea, Hong Kong, and Australia.

### INSIGHTS



2017 Emerging Markets Mid-Year Update

The synchronous global cyclical recovery is supportive for key emerging markets.



# Sectors

several industries.



Case for an Unconstrained Bond Portfolio

An unconstrained approach allows flexible risk allocation in dynamic market conditions.



#### MSCI A-Shares Inclusion

MSCI's Inclusion of China A-shares marks a milestone in the global equity markets.



Aldi is Born

sectors.



The discounter model is taking form in Korea and transforming food retail & distribution.

Statistics.

ALTERNATIVE INVESTMENTS

Browse our range of alternative investments ranging from Private Equity to Real Estate.

### Asia's CAPEX Pickup in a Trio of

Signs of recovery are emerging around the region as evidenced in

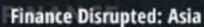
#### Affordable Housing in India

If executed well, the "Housing for All by 2022" scheme is a big opportunity as a multiplier effect that traverses

# Korean Discount Brands: Another

## MULTIMEDIA

**Global Fixed** Income Strategy The case for unconstrained global fixed income investin



Rahul Chadha, co-CIO of MAGI HK, describes how technology, dig data, and mobile adoption will transform financial services in Asia.









**Emerging Markets** 



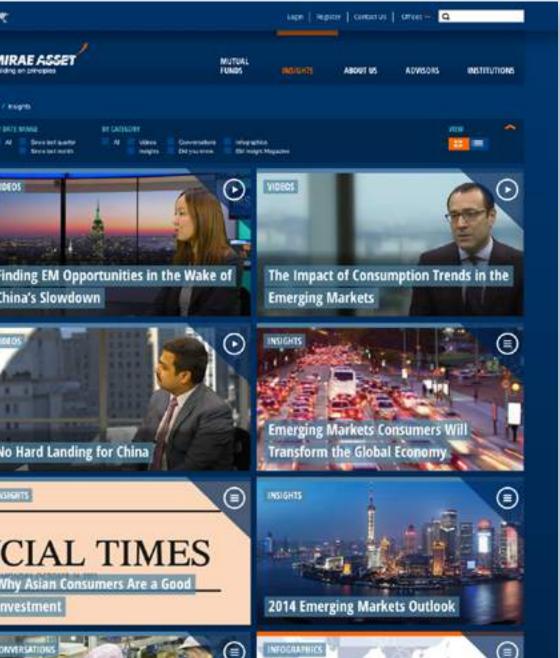
NCIAL TIMES

Why Asian Consumers Are a Good

estment

**China's Slowdown** 





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AM A

FEATURED FUND

INDIVIDUAL

# **Euroclear Annual Report – Print Version**

27.5 Trillion Euros held in custody for clients

Euroclear, one of the world's largest providers of post-trade processing for bond, equity, ETF and mutual fund transactions, engaged Peregrine to design and produce their annual report.

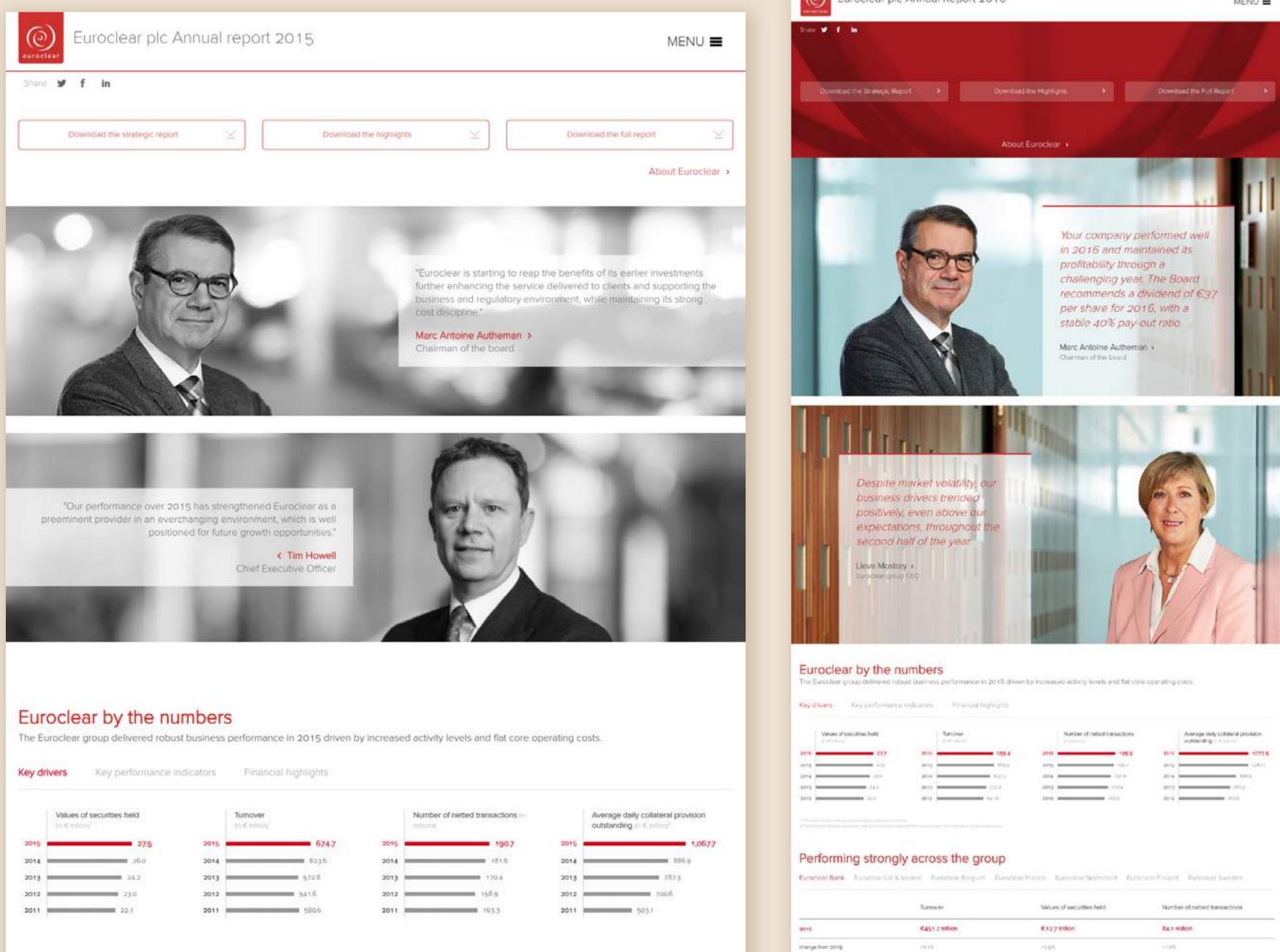
Provided creative direction on the design, typography, photography, layout and finishing of the report. We also designed a series of graphics and infographics to illustrate highlights and key performance data. Created a foldout infographic at the front of the report to present the complex business areas of Euroclear within the brand guidelines.

Artworked the entire 110-page report and formatted 70-pages of text and accounts from Word into InDesign.

Created a digital version of the report which was responsive and in line with the existing Euroclear website.



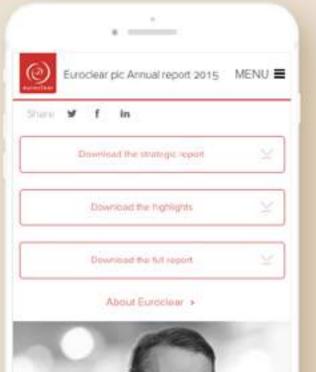
### **Euroclear Annual Report – Online Version**



Euroclear plc Annual Report 2016

MENU E

|   | Turnover        | Values of securities held | Number of netted transactions |
|---|-----------------|---------------------------|-------------------------------|
|   | 6451.7 trillion | 612715805                 | Ran million                   |
| 6 | 10.10           | -2.5%                     | 110                           |





"Euroclear is starting to reap the benefits of its earlier

| uroclear Bank    |                                  | ~ |
|------------------|----------------------------------|---|
|                  | Turnover                         |   |
| 2015             | 6.643.0 trition                  |   |
| change from 2014 | +5.35                            |   |
|                  | Values of securities held        |   |
| 2045             | 64426 trillion                   |   |
| change from 2014 | +5.33                            |   |
|                  | Number of retail<br>transactions |   |
| 2015             | 64426 trillon                    |   |
| change from 2014 | +5.33                            |   |
|                  |                                  |   |

| 2014<br>2013<br>2013<br>2013<br>2013<br>2014<br>2015<br>2014<br>215<br>Unit cost evolution<br>2019<br>2014<br>2015<br>0.26<br>2014<br>0.27<br>2013<br>2013<br>0.27<br>0.26<br>2014<br>0.27<br>0.26<br>2014<br>0.27<br>0.26<br>2015<br>0.26<br>0.26<br>0.27<br>0.27<br>0.27<br>0.26<br>0.26<br>0.27<br>0.27<br>0.27<br>0.26<br>0.26<br>0.27<br>0.27<br>0.27<br>0.26<br>0.26<br>0.27<br>0.27<br>0.27<br>0.26<br>0.26<br>0.27<br>0.27<br>0.26<br>0.26<br>0.27<br>0.27<br>0.26<br>0.27<br>0.26<br>0.27<br>0.27<br>0.26<br>0.27<br>0.27<br>0.26<br>0.27<br>0.27<br>0.26<br>0.27<br>0.27<br>0.26<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.26<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27<br>0.27   | pedorma    | clear group delivered rot<br>ince in 2015 driven by ine<br>d flat core operating cost |
|--|------------|---|
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Providing bespoke services to companies, trusts and individuals since 1987.

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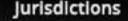
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Chat with us

SOVEREIGN

## Search Sovereign's Services

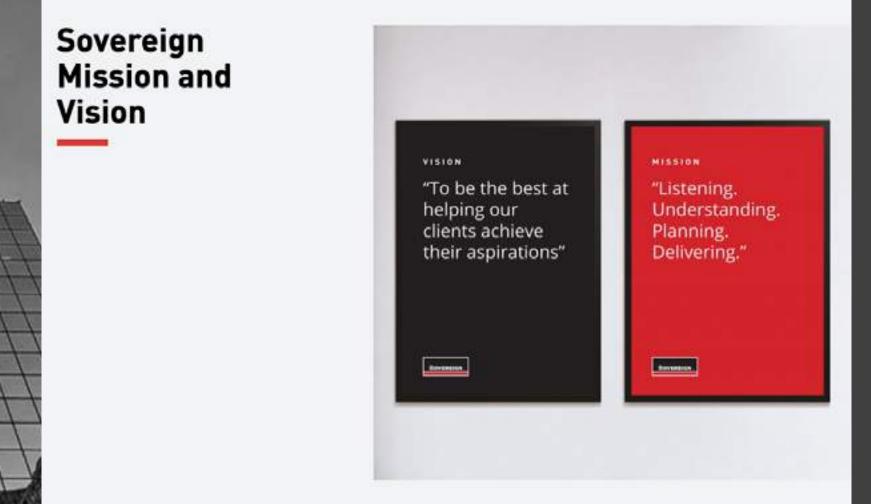
Occupation What do you do? Main Services What services do you need?



Resources

Contact Us

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# The Sovereign Group

1994 - 2013

Sovereign is one of the largest independent corporate and trust service providers managing 20,000 structures for a wide variety of clients with AuM in excess of £20 billion.

I was responsible for the creation of Sovereign's corporate identity, branding and creative direction of the Sovereign Group's global marketing initiatives – print and digital - across 20 jurisdictions for a period of nine years. I am to very proud to say that the identity of Sovereign remains the same to do this date.

As Brand Ambassador, I designed and managed global print and digital advertising campaigns in numerous languages, the quarterly Sovereign Report publication, office interiors and signage, as well as ALL internal and external marketing collateral maintaining a consistent global brand experience across 20 jurisdictions.

https://www.sovereigngroup.com





### The Sovereign Art Foundation

The Sovereign Art Foundation (SAR) is Sovereight philanthropic ann Pstablished in Hong Kong in 2003, SAR works with disadvantaged

### About us

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Specific Services Choose specific services

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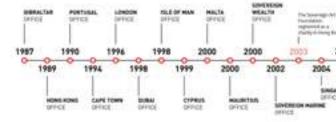
# The Sovereign Group

1994 - 2013

https://www.sovereigngroup.com



TIMELINE OF INCORPORATION OF SOVEREIGN OFFICES AND REGISTRATIONS OF THE SOVEREIGN ART FOUNDATION WORLDWIDE





# **The Sovereign Art Foundation / Art Prize**

2003 - 2011

Whilst serving as Brand Ambassador at the Sovereign Group, a new charity initiative was launched by the Group's Founder Howard Bilton, and was asked to design the identity and brand guidelines for the Sovereign Art Foundation and its Prize events across four continents – the Asian, European, Middle East and African Prize competitions and events.

As sole designer, I collaborated with a small team managing all global advertorial, print and digital marketing projects from concept to delivery promoting the Art Prize held in multiple regions: Asia, Europe, the Middle East and Africa.

Designed and managed promotional collateral – print & digital – for sponsors: Jaeger-LeCoultre, Bulgari, Louis Vuitton, Barclays Wealth, the Financial Times, Cathay Pacific and Marina Bay Sands Singapore to name a few.

The Prize is now recognised as the most prestigious prize in its field.

https://www.sovereignartfoundation.com

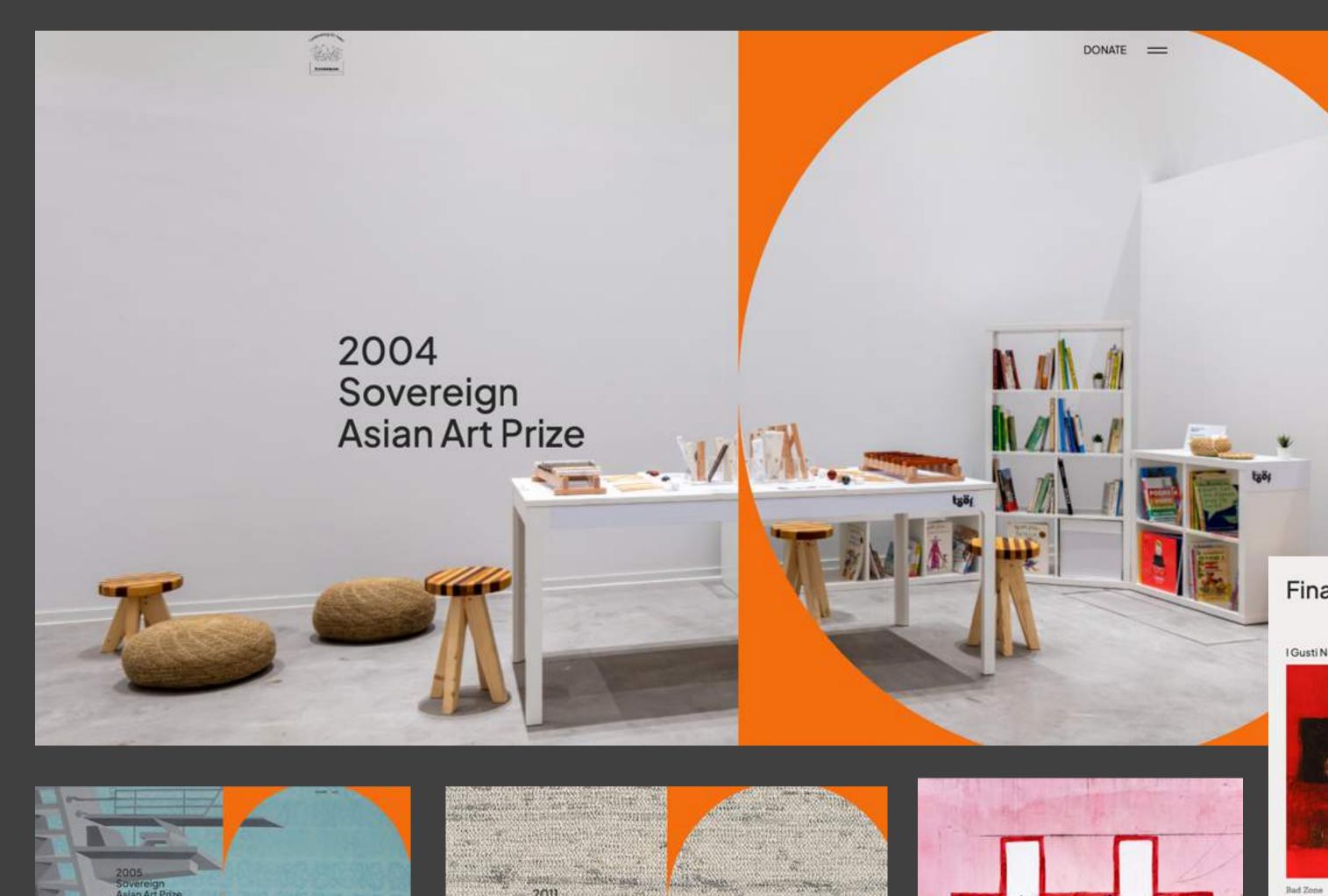








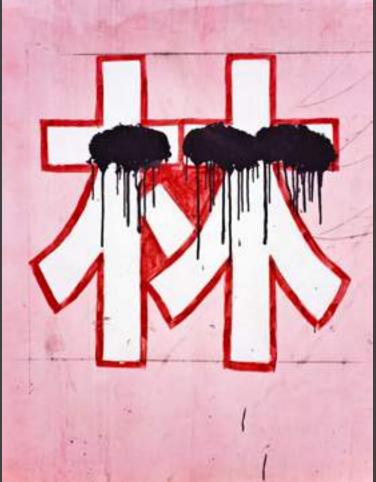




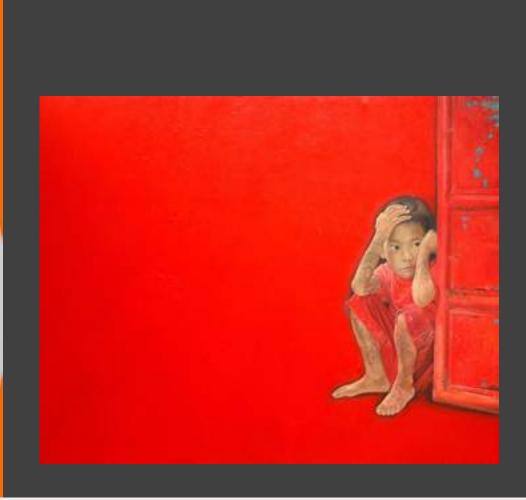








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# Finalist

Tang Shu

Crying Out

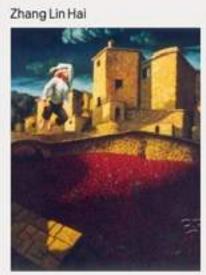
I Gusti Ngurah Buda



Lu Min



Behind the Scene of Myanmar Classical Dancers



Drama Series No.1

Lee Kwok Chuen



Oon Boon Khong



Ever Striving Never Daunted

Chan Tuck Yew Ernest

Capsicum

Hanny SK









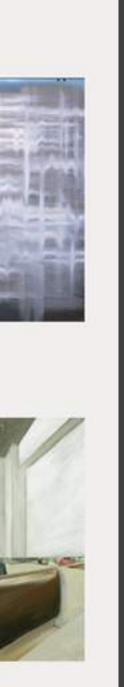


Chow Chun Fai



Local Café Mongkok





# "Howard's Folly" Corporate Identity, Branding, Label & Packaging Design

"Howard" Bilton of Howard's Folly had a vision to promote the wines of the Alentejo and Portugal to a wider global audience, in collaboration with Portuguese wine maker & co-founder David Baverstock.

Whilst serving as Brand Ambassador at the Sovereign Group and the Sovereign Art Foundation, CEO & Founder Howard Bilton asked me to design the identity and manage the brand development of Howard's Folly Wine, including label design, packaging and marketing materials. We created the concept of showcasing the art from the Sovereign Art Prizes on the labelling of the wine each year.

Since the 'folly' launched, Howard's Folly Wine has produced an abundance of award-winning wine and has its own state-of-the-art winery including two restaurants and a wine club which I'm proud to say still use the same identity I created many harvests ago.

https://www.howardsfollywine.co.uk

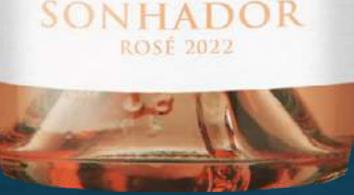


**HOWARD'S FOLLY** 



HOWARD'S FOLLY SONHADOR BRANCO 2021





Where we make our Alvarinho



PORTO

# PORTUGAL

HOWARD'S FOLLY



HOWARD'S FOLLY SONHADOR **TINTO 2016** 

VINHO REGIONAL ALENTEJANO PRODUCT OF PORTUGAL

LISBOA



FARO



# **Arundel Rebrand**

Responsible for the redesign and renaming of Arundel's corporate identity and marketing materials following its acquisition.

Work involved creating a new identity, corporate and product marketing collateral, photography, building a responsive website with a Swiss Stock Exchange API and branding guidelines.



ABOUT ARUNDEL

The Group provides investment banking, management and advisory services and makes principal investments across developed and emerging markets.

Subsidiaries of the Group are regulated in the transaction of their businesses in the US, UK and Mauritius.



#### Investment Banking

The Group provides specialist investment banking services to public and private companies.

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#### Principal Investments

The Group owns real estate assets in Germany and the UK and has conditionally acquired real estate assets in India for development. The Group plans to make further investments in real estate and other selective assets as attractive opportunities arise.

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#### Investment Management and Advisory

The Group provides investment management and advisory services to family offices and fund management groups with a focus on investment in India, the US and Europe. It has also acted as European adviser to highly regarded investment managers in the fields of energy and value investing in the US.

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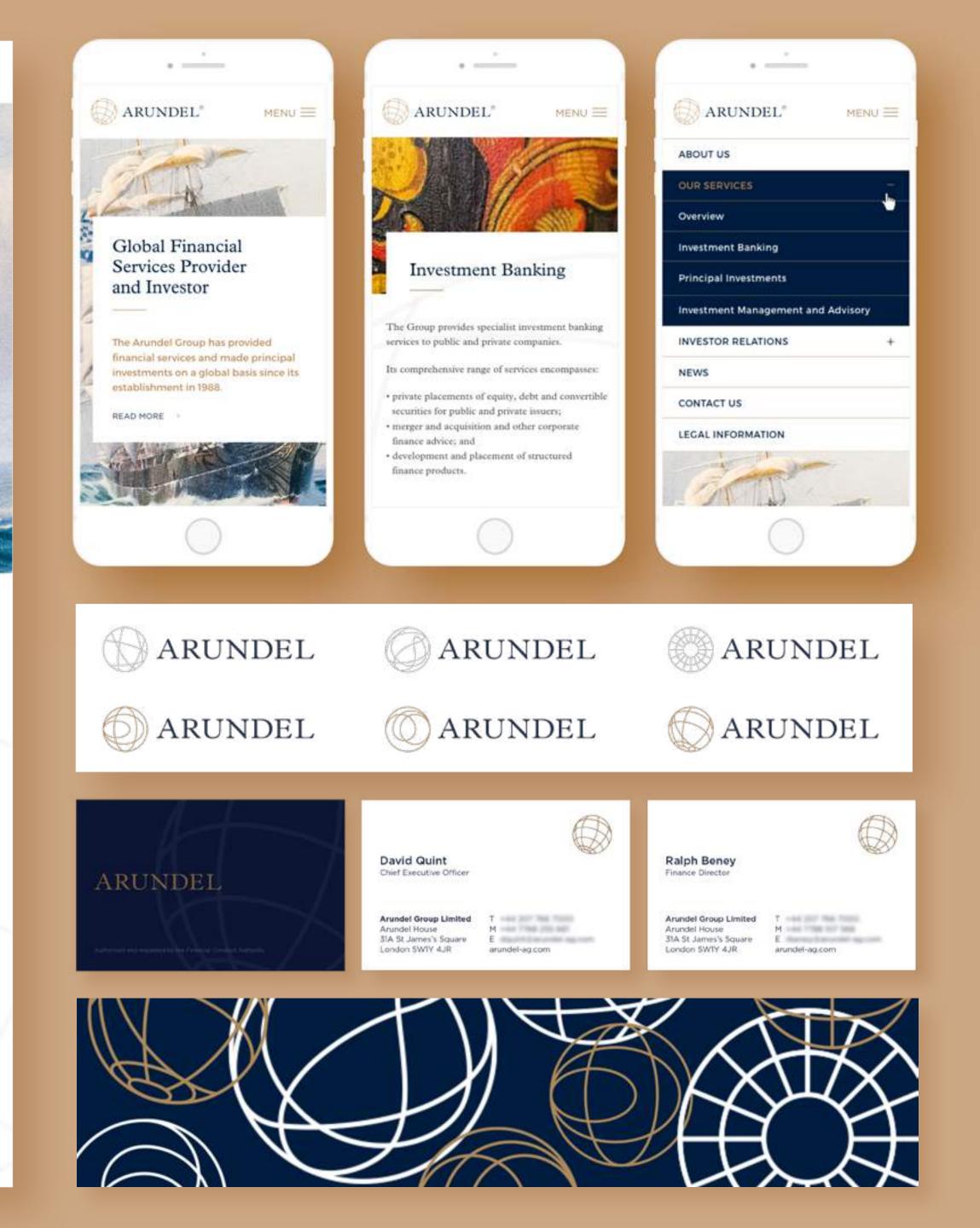
#### ABOUT US OUR SERVICES INVESTOR RELATIONS NEWS CONTACT US











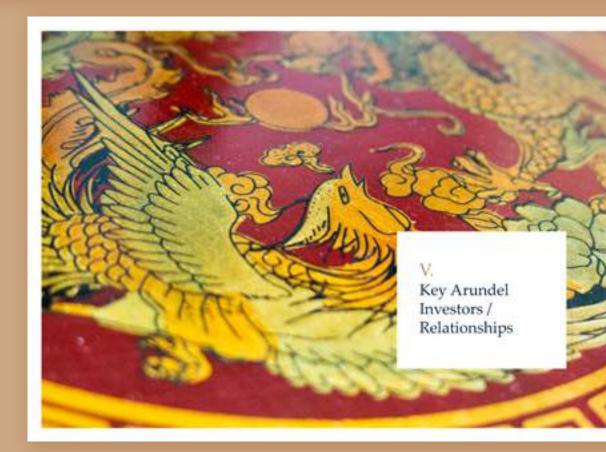


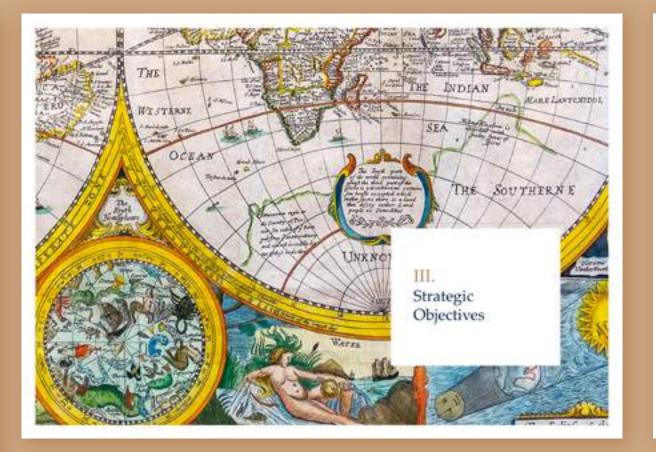


# **Arundel Corporate Presentatoin**

Following on from the rebrand, a corporate deck was designed to promote Arundel's services.

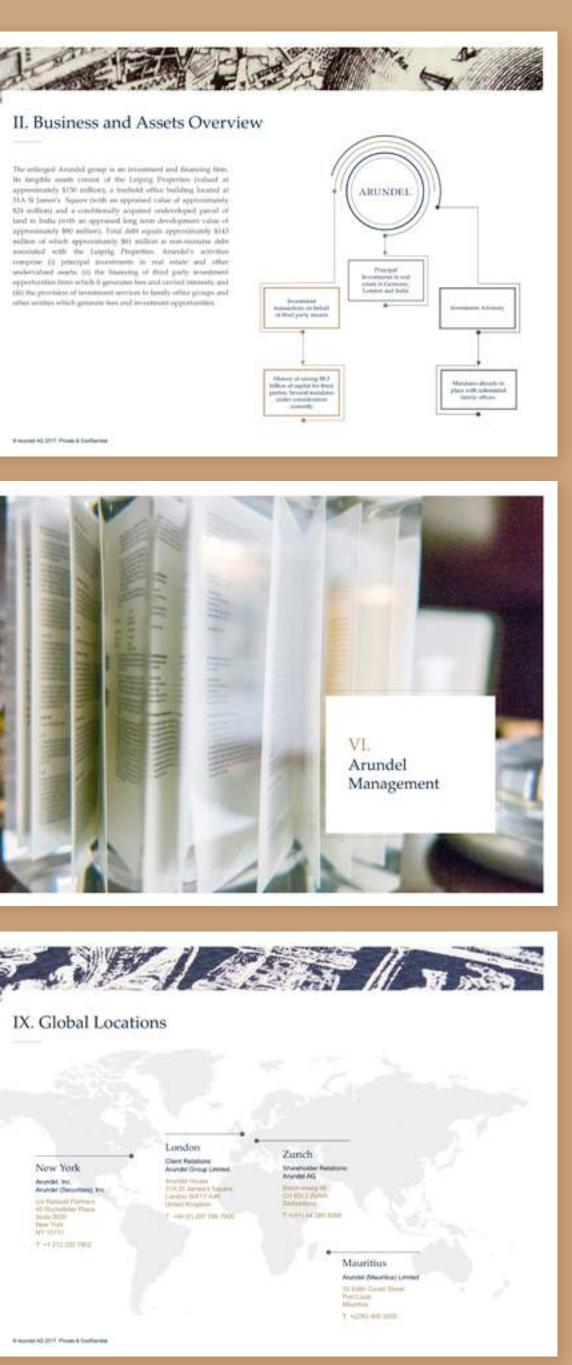
I photographed the interior of Arundel's London head office and the photographs were used throughout the presentation, website and other marketing material.





### II. Business and Assets Overview

The entitinged Amended group is an interestment and foraming lines. Its tangible assets consist of the Leiguig Properties (valued at approximately \$150 millions; a method office building locand at approximately \$150 estillates; a two-baild office building located at 31A.54 Janues's Space (with an approximal value of approximately \$24 million) and a conditionally acquired underweloped parted of land in build (with an approximal long term development value of approximately 400 million. Triad deel equate approximately \$143 million of which approximately \$61 million in con-monotone deltw monotation with the Languig Properties. Available activities comprise (i) principal synchromolis in real estate and other indervalued month, (ii) the financing of third party investment exponentiation from which it generates from drived transformed approximation from which it generates from an attribute activities and (iii) the generation of investments from the landy affair generation. e provision of investment services to family office groups and elisch generate lien and investment copy



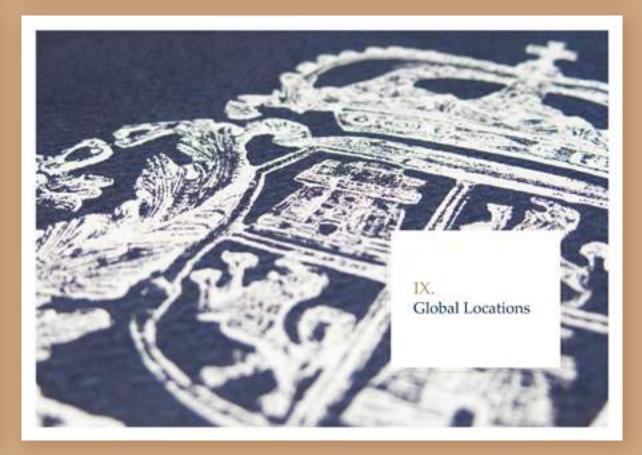




### VI. Arundel Management

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#### Interest AD 2017 Private & Earthian







#### IX. Global Locations



# "Muniverse" Infographic

\$10 billion in average order flow per day

Steering a dynamic collaboration that brought together illustrators, copywriters, and social media experts, we worked handin-hand with our client to craft a compelling infographic for MarketAxess, a vanguard in electronic trading for global credit products. The "MarketAxess Muniverse" infographic artfully charted the evolution of municipal bond trading, underscoring MarketAxess's pivotal role. Simultaneously, we honed their branding guidelines, optimizing the infographic's impact and reach.

Each piece was designed to shine individually, perfect for promotions on diverse platforms from social media to email campaigns. This not only amplified reach but also prolonged engagement. Recognising the dynamic nature of financial markets, we equipped the client with malleable digital templates, ensuring realtime content adaptability.

The results spoke volumes. Our meticulously crafted campaign resonated deeply within the financial community, driving formidable website traffic and converting passive engagements into actionable leads. This endeavor epitomises the potent blend of purpose, innovation, and strategic foresight.

# MARKETAXESS **MUNIVERSE**



\* 🕐

1,100+ institutional investors and broker-dealer firms have chosen MarketAxess' electronic credit marketplace.

Have you tried it yet?





## **MANUAL EXECUTION**

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82

ELECTRONIC EXECUTION

Efficient trading protocols – including Bid Wanted list execution of up to 200 line items, multi-dealer RFQ, single RFQ and all-to-all Open Trading™ for both investors and dealers to execute taxable and tax exempt bonds

VS.





| MARKETAXESS<br>MUNIVERSE<br>A new way to trade Municipa  | l Bonds  |
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|  |  |
| 2000<br>MarketAxess introduced the first<br>web-based multi-dealer credit<br>market trading platform.  | * • **   |
| Build America Bonds (BABs) are<br>created. Since 2009, MarketAxess<br>has received over \$2.3+ bn total<br>in BABs inquiry volume.   | ~~   |
|  | 2016<br>MarketA<br>Municipe<br>6,000+ N<br>log in da<br>investme<br>and eme  |
| 1,100+ institutional investors<br>chosen MarketAxess' electro<br>Have you tried it yet?  |  |
| MANUAL EXECUTION<br>Efficient trading protocols<br>execution of up to 200  |  |
| Access i<br>marketp<br>a global<br>network<br>institution  | s. GLOBAL N<br>a central<br>lace with<br>liquidity<br>of 1,100+<br>al investors<br>dealer firms                          |
| LESS INFORMATION<br>Boost your trading<br>strategy with pre-and<br>post-trade data and<br>reporting including<br>dealer inventory and<br>client/dealer axes,<br>IDC, JJK, MSRB data<br>and TCA reporting | s. MORE PRE/P  |
| SLOW PROCESSES   | s. FASTER CON<br>Assist users in com<br>execution requiren<br>workflow with full<br>Processing (STP) in<br>With TICKETLE |



# **OCSiAl Website**

We were approached by OCSiAI to provide creative and strategic consultation on the messaging, design, development and branding of their corporate identity, product messaging and website.



together the who's who of the Indian rubber industry.





#### Dear Materials production: properties enhanced and net cost reduced

OCSIAN world first: capability for unlimited, low-cost production of Sing Walt Carbon Nanotubes announced at Institute of Materials

Yari Karapachinskip cort by Yari Rangachinskip

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To star Papelum

# One step closer to the materials of the future

#### Dear Alan,

Nanomaterials have long been recognised as a modifier with the potential to fundamentally alter many global industries. Whilst single walled carbon nanotubes are well known to increase most materials core properties, their prohibitive cost has always hampered practical application across industries.

I am contacting you today because OCSiAI has developed a breakthrough in the production of single walled carbon nanotubes that enables us to supply them at a cost starting from \$2,000 per kg. This comes without a reduction in quality, as OCSiAI 'TUBALL' nanotubes contain 75% single walled carbon nanotubes.

The importance of this development for many industries cannot be overstated. For the first time this technology is available to numerous industries at a commercially viable price point, opening up the vast potential for materials to be more effective; from products like batteries and tires to goods from plastics and metals.



We wanted you to be one of the first to hear about this breakthrough and invite you to view the presentation that was held on 12 May 2014 at the Institute of Materials, Minerals and Mining in London.

See how 'TUBALL' nanotubes can be applied in vour industry on en ocsial com/usage

# **OCSiAl Email** Campaign

Created a modular, responsive email template in English and Russian to promote the launch of OCSiAl's brand and TUBALL product in Europe and the US. The design of the template complied with the branding of the website.



# C Si Al

nanomaterials for the global

carbon

industry

people

1 dream

industry.

TEAM



We are one of the most experienced teams in the nanomaterials





Dear Materials production: properties anhanced and net cost reduced Nati Kanapathinskip cont in Yari Kanapahinskip Annual Proceedings, 212 West, 2021 P. Ltd. To Marchanton

## One step closer to the materials of the future

#### Dear Alan,

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TUBALL

Nanomaterials have long been recognised as a modifier with the potential to fundamentally alter many global industries. Whilst single walled carbon nanotubes are well known to increase most materials core properties, their prohibitive cost has always hampered practical application across industries.

I am contacting you today because OCSiAI has developed a breakthrough in the production of single walled carbon nanotubes that enables us to supply them at a cost starting from \$2,000 per kg. This comes without a reduction in quality, as OCSIAI 'TUBALL' nanotubes contain 75% single walled carbon nanctubes.

The importance of this development for many industries cannot be overstated. For the first time this technology is available to numerous industries at a commercially viable price point. opening up the vast potential for materials to be more effective; from products like batteries and tires to goods from plastics and metals.



about this breakthrough and invite you to view the prepentation that was held on 12 May 2014 at the Institute of Materiale, Minerals and Mining in London.

See how 'TUBALL' nanotubes can be applied in your industry on en.ocsial.com/usage.

Prosident OCSIAI



AGE DINAMICS

Dissection & 2014 (COSIA: All rights reserved Thereis for supporting (COSIA



We wanted you to be one of the first to hear

Best regards,

Yuri Koropachinskiy



### **Russian Version**

(1998) Производство материалов: прорыв в свойствах и себестоимости DOM - Carbon Renormanian by the United Industry, and its OCOM - Carbon Renormalization for the Dated Industry Terry Wester, 10 May 2010 (\* 24 The Man Manhaolte

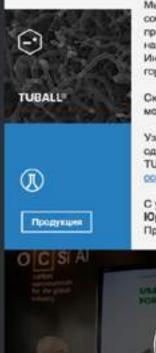


Yaawaawu/an << Tost First Name >>,

Углеродные нанотрубки - отличный пример того, как нанотехнологии могут менять свойства материалов. Но собственная цена одностенных углеродных нанотрубок до настоящего момента являлась настолько высокой, что создавала непреодолимый барьер для их использования в большинстве отраслей.

Хочу сообщить Вам, что в производстве адностенных углеродных нанотрубок произошел технологический прорыв. Технология, внедренная компанией OCSIAI, позволяет производить одностенные углеродные нанотрубки в промышленных масштабах по цене от 2 тысяч долларов за юлограмм. При этом содержание одностенных углеродных нанотрубок в конечном продукте составляет 75%, что является показателем исключительно высокого качества.

Значение произошедшего события сложно переоценить. Впереые углеродные адностенные нанотрубки стали доступны для многих отраслей по цене, делающей их приманение экономически эффектианым.



Мы хотели, чтобы Вы узнали об этом событии одним из переых. Переая презентация одностенных углеродных нанотрубок TUBALL состоялась 12 мая в Институте материалов, минералов и горного дела в Лондоне.

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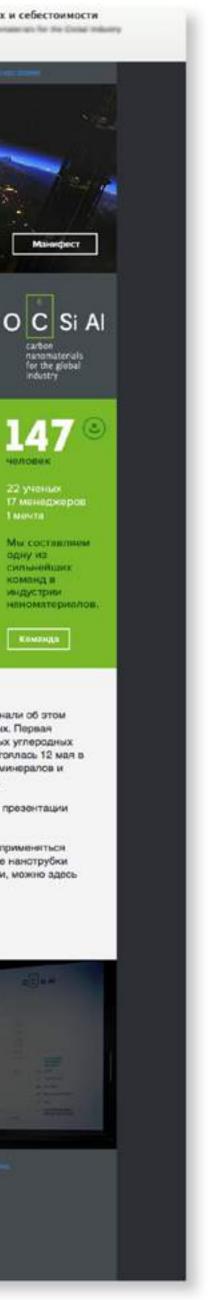
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Скачать полную версию презентации MONORO BROOM

Узнать о том, как могут применяться одностенные углеродные нанотрубки TUBALL в Вашей отрасли, можно адесь ocsial.com.

С уважением, Юрий Коропачинский Президент OCSIAI





# **OCSiAl "Carbon Age" Product Launch**

As the lead designer for OCSiAI's "Carbon Age" product launch, I oversaw the marketing design and production for their corporate brand and product, TUBALL, introducing them as pioneers in single-walled carbon nanotubes with expertise in chemistry and physics across Europe and the US.

My responsibilities encompassed event management, from location scouting to crafting signage, backdrops, presentations, and corporate gifts, supplemented with professional photography and video services.

The event was a resounding success with an 86% attendance rate (60 out of 70 invited). Acclaimed feedback from industry elites not only boosted OCSiAI's reputation but also garnered attention from notable entities and publications including Rolls-Royce, European Bank for Reconstruction & Development, PwC, Cambridge Nanotherm, and media outlets such as Bloomberg BusinessWeek, Reuters, and AZoNano.









# **Data-driven** landing page

150 years of essential intelligence

I was approached by S&P Global to review the analytics of their existing landing page and provide a design solution that adhered to their new brand guidelines and increase the number of signups for their Platts product.

The final design implemented became the template for all of their product landing pages. The approach to the strategy, content and layout of the elements on the page also resulted in providing guidance to how data points, infographics, pictograms, CTA buttons and forms would be presented on their website.

S&P Global Platts

# Get real-time data insights and projections on commodity flows

### Platts cFlow

Gaining a deeper, richer understanding of today's waterborne commodities market requires more than simply connecting the dots on a satellite map. To complete the picture, you need to combine real-time vessel location information with the latest news, market data, trends, prices, insights and analysis.

Platts cFlow is a trade flow analytics service that allows you to view, monitor and analyse the key factors affecting the supply chain and impacting prices such as vessel movement, cargo data and freight bunker pricing information.



and future flows

Request Trial Now >

# Platts cFlow **Essential numbers**

| 60,000+<br>SHIPS AND TANKERS<br>TRACKED GLOBALLY WITH<br>AIS HISTORY FROM 2010 | 12,000+<br>GEOGRAPHICAL ZONES<br>TO JETTY LEVEL | 12,524         |
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| 30   | 1,000   | 3,225          |
| MINUTES TRACKING<br>POSITION UPDATED   | VESSELS ON DISPLAY                              | 424<br>REGIONS |
|  |   | 185            |

# See everything.







Visualise and analyse past trends, real time diversions

64 BUNK PORTS

776 COALJETTIES

247 IRON ORE JETTIES

199 LNG JETTIES

# See everything. Know more. Act quicker.

With Platts cFlow you can be the first to know about vessel diversions, establish a ship's ETA and destination and learn if a tanker's full or empty. In business terms, this informed insight can prove as valuable as the cargo itself.



Compare past, current and future rade flows to spot and seize opportunities.

60,000+ ships and tankers tracked globally with positions updated every 30 minutes

Covering Crude, LNG, LPG, Chemicals, Oil Products, Iron Ore, Coal and Containers.

First Hume

× Visualization and volumetric trade flow data

Platts cFlow splits waterborne commodity world into 12,000+ zones allowing you to monitor and compare trade flows by vessels or commodity.



To help avoid demurrage and additional costs, gain competitive insight and make more informed decisions.

# Learn how Platts cFlow can help you and your business.

Submit your details now and receive a free trial of the Platts cFlow analytics service

To speak to our product specialists, call +1 855 639 9396

**PLATTS ANALYTICS** 

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# About S&P Global

For the past 150 years, we've been here. Gathering ner of the globe, to del ratings, assessments and analyses that governments, companies and individuals depend on the world over.

Our unique offerings—Ratings, Market Intelligence, S&P Dow Jones Indices and Platts—work together to give you the complete picture of the markets.



S&P Global Platts equips customers with the essential information to identify and seize opportunities in energy and commodities, stimulating business growth and market transparency. 5







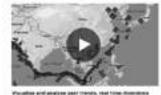
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Platts eFlow is a trade flow analytics service that allows you to view, monitor and analyse the key factors affecting the supply chain and impacting prices such as vessel movement, cargo data and freight banker pricing information.



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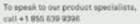
### See everything. Know more. Act quicker.

With Platts cFlow you can be the first to know about vessel diversions, establish a ship's ETA and destination and learn if a tanker's full or empty. In business terms, this informed insight can prove as valuable as the cargo itself.

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### Learn how Platts cFlow can help you and your business.

Submit your details now and receive a free trial of the Platts cFlow analytics service



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#### Platts cFlow



Essential business intelligence you need to inform every decision.

Gaining a deeper, richer understanding of today's waterborne commodities market requires a combination of real-time vessel location information with the latest news, market data, brends, prices, insights and analysis.



Platts cFlow is a trade flow analytics service that allows you to view, monitor and analyse the key factors affecting the supply chain and impacting prices such as vessel movement, cargo data and freight bunker pricing information.

We provide the intelligence that is essential to how participants of the capital and commodity markets make decisions with confidence.

Want to know more? Find out how Platts of low or Nelp you and your business. Contact us > Call +1 855 903 1545



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S&P Global Platts

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# **Real-time insights** and projections on commodity flows

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Learn what the Platts cFlow essential commodity analytics tool can do for you.

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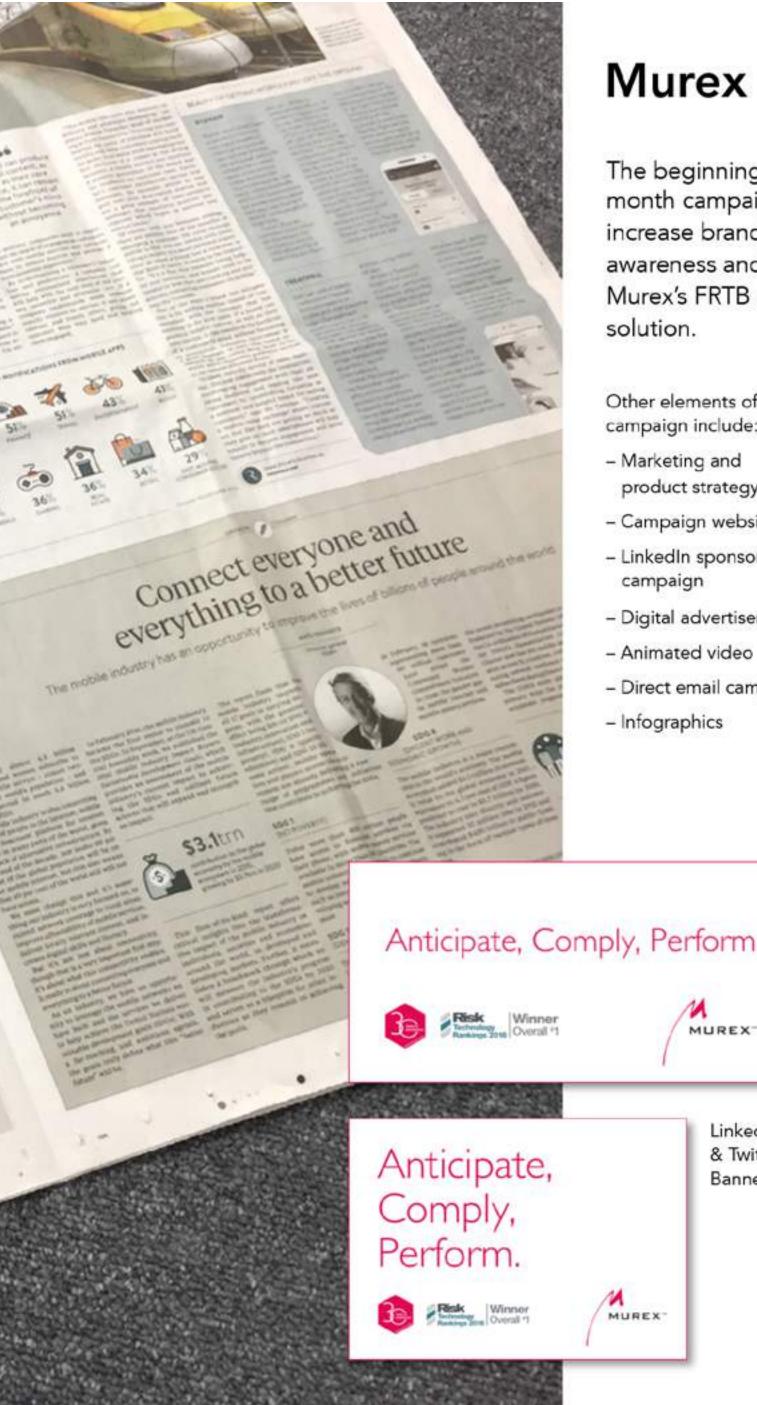
With 30 years' experience partnering with financial institutions across the globe, we are the leading technology provider to the capital markets. Murex's award-winning enterprise risk manageme platform MX3, enables financial services firms to anticipate the impact of regulation, comply with fast-changing requirements and improve their business performance. Discover more at murex.com

Anticipate, Comply, Perform.

MUREX-

Get on board for the full mobile journey Disruptive potential of mobile technology

W



# Murex FRTB Campaign #1

The beginning of a four month campaign to increase brand awareness and promote Murex's FRTB product

Other elements of the campaign include:

- Marketing and product strategy
- Campaign website
- LinkedIn sponsored campaign
- Digital advertisements
- Animated video
- Direct email campaigns
- Infographics

# Anticipate, Comply, Perform.

LinkedIn & Twitter Banners



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Sunday Times 'Raconteur' Supplement Half Page Print Advertisement

# Anticipate, Comply,

Perform.

Financial institutions need to anticipate the impact of regulation, comply with fast-changing requirements and improve business performance. Our award-winning technology platform helps solve these challenges.

Murex is the leading provider of risk management, trading and processing solutions to the capital markets. With over 30 years' experience we serve 45,000 daily users in financial services, including 60 of the world's top 100 banks".

Anticipate, comply and perform with Murex.

### Discover more at murex.com



# El Sturdza – Building **An Innovative Brand**

Complete rebrand across the entire group, positioning El Sturdza as an innovative asset management business through creative productdriven integrated campaigns. Every touch point of the brand was considered and designed from email signature to social media platforms, their website to office signage. Each fund product has its own distinct branding and marketing collateral.



Old Logo



New Logo

#### WEBSITE FUND BANNERS







#### WEBSITE NEWS AND INSIGHTS FUND GRAPHICS



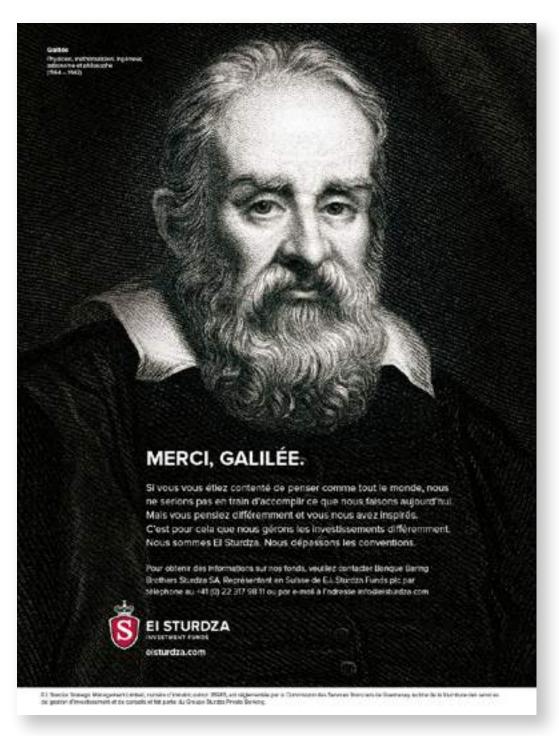


# El Sturdza Campaign – "We Go Beyond The Conventional"

Created a multilingual print and digital advertising campaign to create awareness of El Sturdza following their rebrand. Introduce company ethos, business model and strategies.

The concept "We Go Beyond The Conventional" connected and related with the great minds of the past, despite the challenges they persevered. El Sturdza think differently and this is how they manage investments.

Results were magnificent increasing awareness of the brand amongst the investment world. Visitors to the website increased by 600% within a six month period, resulting in meeting their investment objectives.



Galileo Galilei Physicist, mathematician, engineer, astronomor and philosopher (1564 – 1642)

If you'd stuck to thinking like everyone else, we wouldn't be doing what we do now. You thought differently - and inspired us to think differently. And that's how we manage investments. We're El Sturdza. We go beyond the conventional.

For Information about our funds please contact Jerome Papallhau on telephone +41 22 317 9827 or via email at J.papallhau@bbbsa.ch

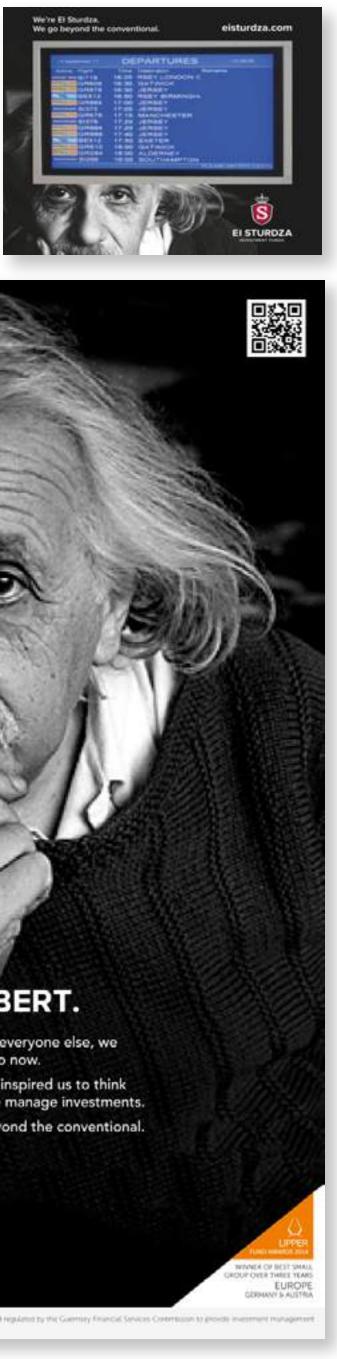


management and advisory services, with registration number 35985.

# THANKS, GALILEO.

**EI STURDZA** 





Airport Banne

Albert Einstein Physicist, Scientis (1879 – 1955)

# THANKS, ALBERT.

If you'd stuck to thinking like everyone else, we wouldn't be doing what we do now.

You thought differently - and inspired us to think

differently. And that's how we manage investments. We're E.I. Sturdza. We go beyond the conventional.

eisturdza.com/discover



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# **"Top Performer" Integrated Campaign**

EI STURDZA

The concept of this omnichannel campaign promoted EI Sturdza's business strategy in their ability to find and nurture the best investment talent. The climber relates to the investment manager and their strategy, carefully choosing their path, studying the terrain, analysing the risk prior to the climb. The campaign ran in pint and digital, appearing in numerous international publications, industry websites, airports and social media. El Sturdza received a substantial increase in investor enquiries due to the effectiveness of the campaign.

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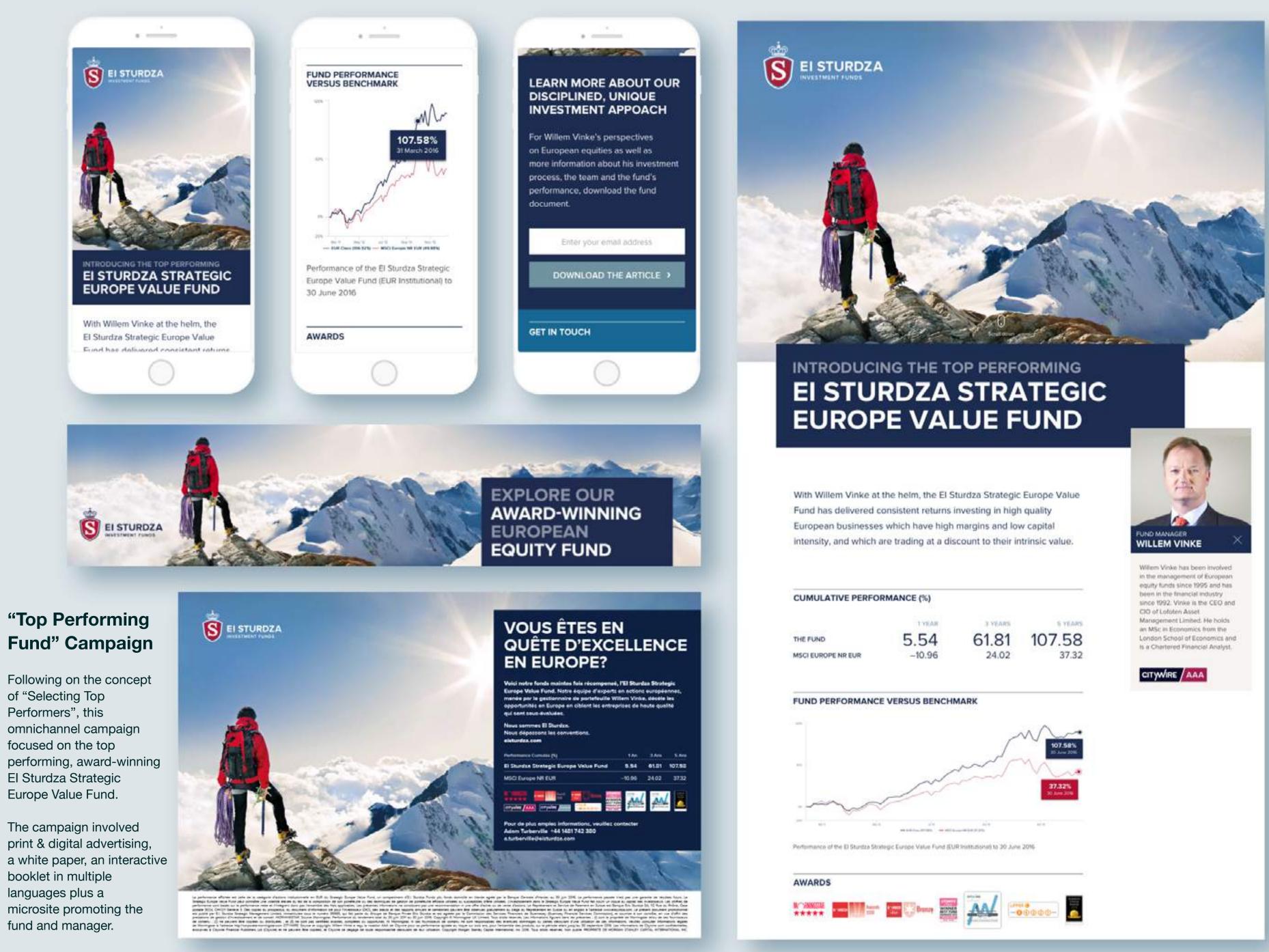
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| CUMULATIVE PERFORMANCE (%) |        |         |         |  |
|----------------------------|--------|---------|---------|--|
|                            | 1 YEAR | 3 YEARS | 5 YEARS |  |
| THE FUND                   | 5.54   | 61.81   | 107.58  |  |
| MSCI EUROPE NR EUR         | -10.96 | 24.02   | 37.32   |  |



PERFORMANCE OVERVIEW

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THE INVESTMENT TEAM



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# WHY CANTAB?

CANTAB EMPLOYS A MULTI-STRATEGY, MULTI-ASSET APPROACH WITHIN THE SYSTEMATIC SPACE. WE AIM TO DELIVER ATTRACTIVE RISK-ADJUSTED RETURNS WITH LOW CORRELATION TO TRADITIONAL INVESTMENTS IN A TECHNOLOGY-DRIVEN ENVIRONMENT.







Cantab for recruitment purposes. Design of the site and navigation was founded on gamification techniques, and I personally photographed all of the images shown on the website.

**Cantab Website** US 4.5 billion AUM

Designed and built a responsive website with two objectives: present Cantab as an innovative technologically-advanced systematic asset management firm and showcase the culture of

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#### NEWS

| CANTAB CAPITAL ANNOUNCES ITS<br>ACQUISITION BY GAM<br>29 JUNE 2016                         | MORE |
|--|------|
| Cantab is delighted to announce that it is to<br>by GAM, a leading global asset management |      |





PASSION FOR SPORTS

REEN CYCLISTS

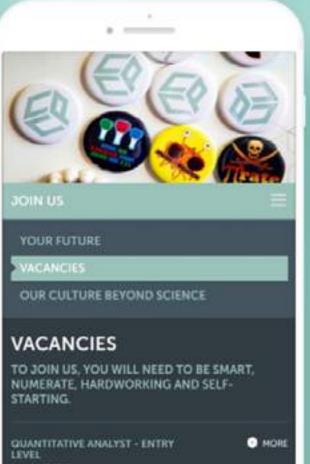
.



### WHY SYSTEMATIC?

MANY AREAS OF MODERN LIFE RELY ON SCIENTIFIC RESEARCH AND ARE GUIDED BY WELL DEFINED RULES THAT ARE APPLIED SYSTEMATICALLY, WHEN FLYING AEROPLANES OR DEVELOPING NEW MEDICINES, PHYSICS, MATHS, STATISTICS AND COMPUTER SCIENCE ARE ALL RELIED UPON. TAKING THESE DISCIPLINES AND APPLYING THEM TO INVESTMENT RESEARCH IS A NATURAL STEP

THE KEY TO THIS TYPE OF INVESTING IS NOT JUST IN TH



multive graduates and post-graduates who want to



MEET THE TEAM WE HAVE A HIGHLY TALENTED TEAM WHO ARE PASSIONATE ABOUT RESEARCHING AND DEVELOPING SYSTEMATIC TRADING STRATEGIES AND INFRASTRUCTURE



DR EWAN KIRK O MORE CHIEF INVESTMENT OFFICER AND FOUNDER OF CANTAB



# Recruitment Campaign

US 4.5 billion AUM

Cantab Capital engaged Peregrine to help recruit suitable postgraduates and junior quants. The strategy included the redesign of the Cantab website and an advertising campaign featuring an algorithm which encouraged successful solvers to get in touch.

This was also supported by a media relations campaign to raise Cantab's profile and that of the principals.

The recruitment advertising campaign featured an algorithm that challenged potential employees to get in touch with an explanation for it, and this novel technique for engagement attracted the targeted new talent.









This is how we order lunch:

 $L^* = \arg \max U_{CANTAB}(X_0(L), ..., X_{N-1}(L))$ L∈L

interested in being the Nth?

Cantab is investment science in action. We apply our scientific backgrounds to building statistical models and fully-automated execution systems, as well as optimising our Friday lunch order. Think you can add some more spice?

### cantabcapital.com/yourfuture



#### **Recruitment Exhibition Banner**



This is how we order lunch:  $L^* = \arg \max U_{CANTAB}(X_0(L), ..., X_{N-1}(L))$ Ľ∈L interested in being the Nth?

cantabcapital.com/yourfuture



This is how we order lunch:  $L^* = \arg \max U_{CANTAB}(X_0(L), ..., X_{N-1}(L))$ interested in being the Nth?

### JOIN US

CANTAB IS INVESTMENT SCIENCE IN ACTION, WE APPLY OUR SCIENTIFIC BACKGROUNDS TO DEVELOPING STATISTICAL STRATEGIES AND FULLY-AUTOMATED EXECUTION SYSTEMS, AS WELL AS OPTIMISING OUR FRIDAY LUNCH ORDER.

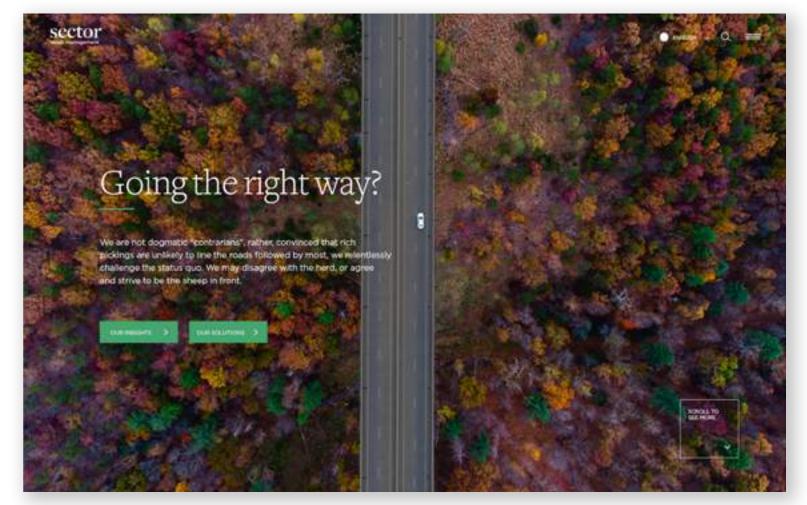
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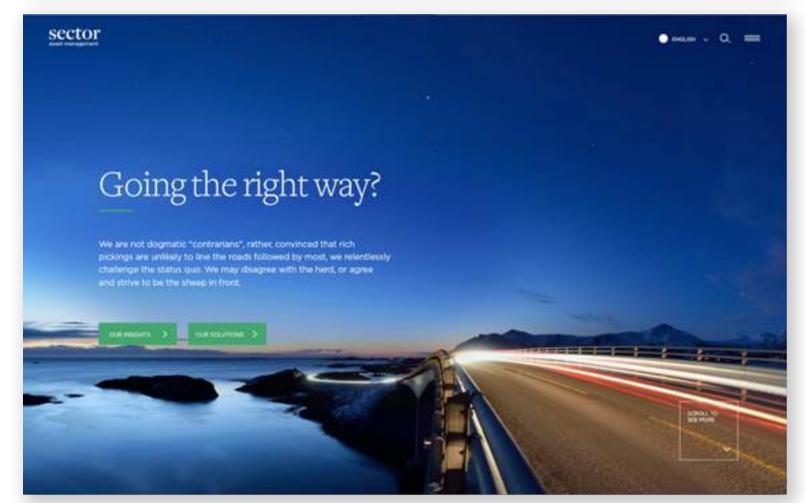


# **Asset Manager Rebrand**

NOK 3,5 billion AUM

Responsible for the redesign of Sector's corporate identity and marketing materials. Work involved a new identity, multilingual website design and build, product marketing collateral, infographics, photography and branding guidelines (identity, typography, colour scheme, graphics and imagery).







Sector Global Investments Fund



Responsive Mobile Website



Freight Big abcedefghijklmnopqrstuvwxyz 0123456789

#### Mark Pro

abcedefghijklmnopqrstuvwxyz 0123456789





#### The Five Sources of Return

minimal 👔 Literar Antoniana 🕐 Del May 2017

and owners are owneed to a multitude of assets and investment strategies. However, belond all the noise, here are only five underlying sources of return. Profibable sweeting recessitates both an understanding of such releting sources of return; or well on, the skills to horsest them.



## Via Negativa

#### remonante 👔 a Synar Amazonanat 🍈 the New 2001

Everybody is booing for "winners" to invest in. Trackies a "positive" information is less robust then "registric; and competition dovalues "positive" information for more than negative". Hence the proposed inversion of mindaet, eliminating losses rather than searching for winners minimizing the information employed straing for simplicity.



PERMIT

### Beating Mr. Market

ren mai 🧯 L. Artar Andereinen 💍 38 Coluber, 2010

Mr. Market's visaliness is weighting partfolis positions based on market capitalization. Even markets have accovered they can bein Mr. Market, as long as they asser the link between price and pertfolio positional size. This is the first stap on the road to beging Mr. Market, Suillad active management is the contribution.





er expression antices and pression

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|-------------------|--|
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Imagery Concepts





### Heritage

### Derivatives Heritage

The Penso team comes with a 25-year heritage in derivatives innovation and its practical application in all asset classes for both alpha generation and risk management purposes. Ari Bergmann was involved in the creation of many of the derivative products widely used today by the financial / investment community. The complexities and inner workings of these sophisticated products and how they are traded are second nature to us.

### Experience in Crises

Managing principal Ari Bergmann has managed capital market portfolios, derivatives trading desks and investment portfolios for 20 years. During this time he actively traded around many financial crises. These include:

- · 1987 Stock market crash
- 1994 Interest rate shock
- · 1998 Russia and Long Term Capital Management contagion
- · 2000 Technology bubble
- · 2001 Argentina peso devaluation
- · 2002 High yield and corporate bankruptcy wave
- · 2007-2008 Sub-prime and credit crisis

### **Risk Management**

Ari headed the Risk Merchant Bank and the Risk Management Advisory at Bankers Trust during the 90s. These groups analyzed risks and developed guidelines and hedging strategies for financial institutions and large corporations worldwide.









## Who We Are

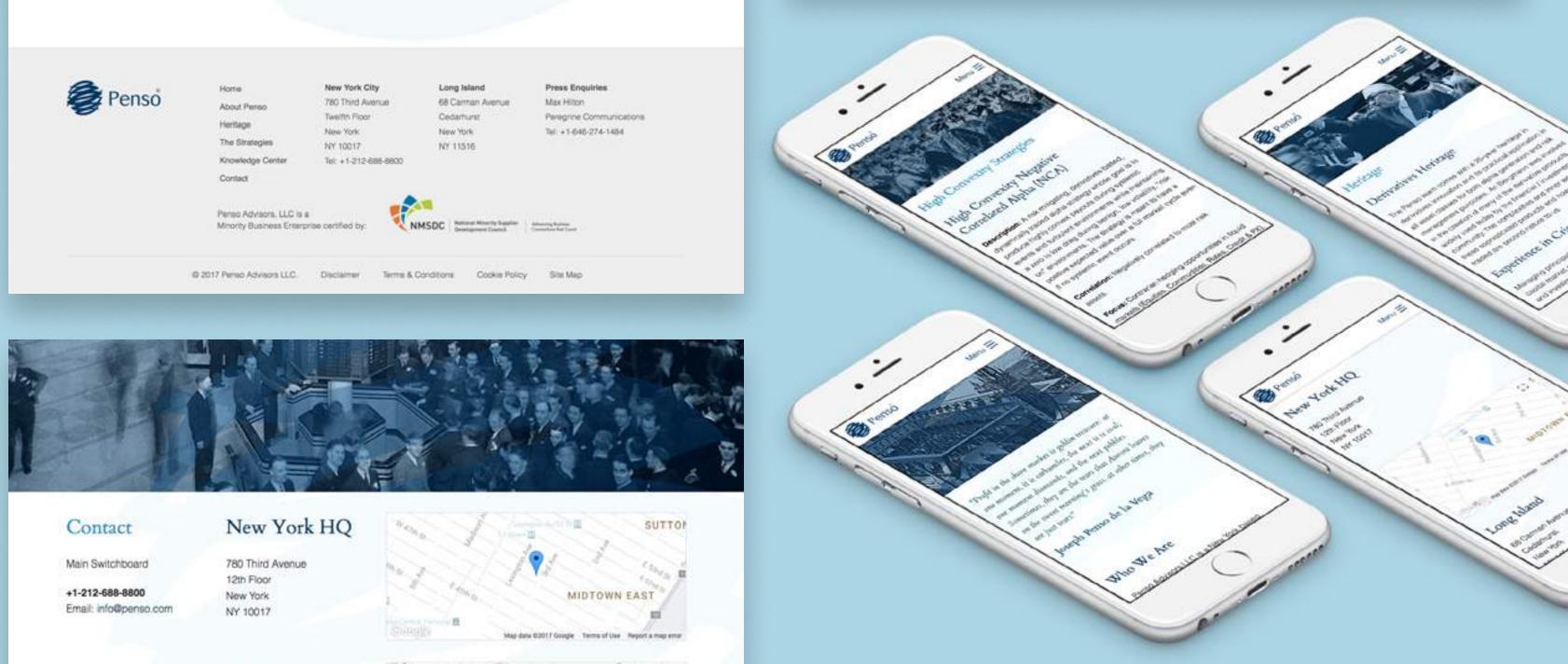
Penso Advisors LLC is a New York based manager and advisory Joseph Penso de La Vega - Author, 'Confusion de Confusiones.' boutique specializing in derivatives structuring/trading, high convexity strategies and systemic risk management. We manage 'Confusion de Confusiones' is the first known book that describes high convexity global macro strategies as well as negative sophisticated financial derivatives. The treatise evidences a high correlated alpha portfolios for sophisticated institutional money degree of sophistication in financial practices. Options, puts, managers and allocators. calls and even shorting are referenced. The book was published in Amsterdam in 1688.

Penso Advisors LLC is a US Securities and Exchange Commission registered investment advisor.

More About Penso



Horitage The Strategie



#### Long Island

# Penso Advisors Website

**RAUM \$1.13 billion** 

New York based manager and advisory boutique specializing in derivatives structuring / trading, high convexity strategies and systemic risk management.

- Design and build of a fully responsive website utilising the Wordpress CMS enabling Penso to update content on the site quickly and efficiently inhouse.
- Branding, logo and imagery development.

Inspiration for the design of the website was drawn from the book 'Confusion de Confusiones', written by Joseph Penso de La Vega, whom the name of the company derived from. It is the first known book that describes sophisticated financial derivatives and one of the FT's ten best books on financial markets. The imagery showcases scenes of historical financial market activity, each overlayed with the Penso logo.

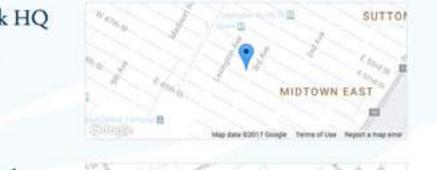
Penso was very pleased with the design and usability of the website and the concept was utilised in subsequent marketing materials. The site launch was supported by a communications campaign focusing on systematic risk. After six months, traffic to the website increased by 600%.

"Profit in the share market is goblin treasure: at one moment, it is carbuncles, the next it is coal; one moment diamonds, and the next pebbles. Sometimes, they are the tears that Aurora leaves on the sweet morning's grass, at other times, they are just tears." Joseph Penso de la Vega

### Our Name

The Financial Times considers it one of the ten best books ever written on financial markets.







## Executive Summary Biographies

We are buyers of convexity with a keen sense for managing downside risk. We are here to be survivors, not heroes.

Penso Advisors LLC is a New York-based manager and advisory boutique specializing in high convexity strategies. Our niche specialty is derivatives structuring/trading and systemic risk management. We manage derivatives based global macro strategies as well as high convexity negative correlated alpha portfolios for sophisticated institutional money managers and allocators. Our clients include some of the largest hedge funds, corporate and public pension plans, endowments/foundations, fund of hedge fund groups and family offices. All our mandates are implemented and managed on a bespoke basis through single-investor structures, such as funds of one or managed accounts. We do not manage commingled funds.

The Penso team, led by Ari Bergmann, has been in the forefront of derivatives innovation and trading and helping investors and corporations deal with difficult to manage risks for over 20 years.

We believe in the old-school of true alpha generating money management style where capital was employed only on compelling, highly asymmetric, mispriced opportunities. We are buyers of convexity with a keen eye for managing downside risk and our entire ethos is based on RISK ADJUSTED returns. Patient anticipation and avoiding the crowds is hard work, at times even unpopular, yet, we believe it is the best way to provide value and stay in the game. We are here to be survivors, not heroes. Ari has been trading the markets with this approach since 1996.

We specialize in a niche space within discretionary global macro and manage two basic strategies.

1. High Convexity Global Macro Opportunities (GMO) - used by our clients as an alternative or to compliment traditional global macro strategies.

2. High Convexity Negative Correlated Alpha (NCA) - used by our clients as the better alternative to "tail risk", volatility arbitrage or short selling strategies.

# **Cognito WOM Annual Print Publication**

Print run of 5,000 distributed throughout APAC, EMEA & USA

Tasked by the CEO to design a newlook Cognito Word-Of-Mouth (WOM) publication, produced annually to showcase Cognito's writing and design skills.

Introduced contemporary typography and colour schemes to complement existing Cognito branding. Liaised with the editor to create concepts and commission Illustrators to support each story. A fine art paper was used in print production and a 'soft touch' laminate was used on the cover.

The publication was well received by Cognito's clients and prospects, resulting in a thorough understanding that Cognito alongside their core PR services also provide the highest level of design services. Furthermore, on receipt of the publication one global institutional client commissioned Cognito to create a series of publications to promote their products.





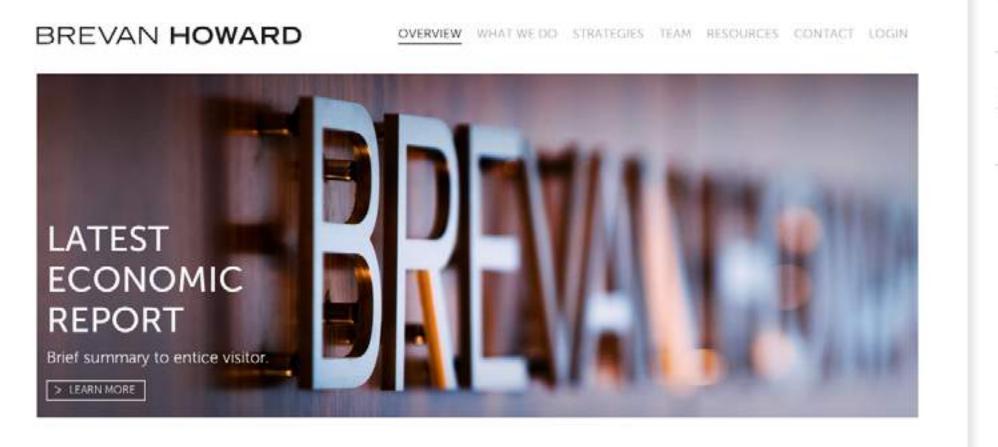






# **Brevan Howard**

Responsible for the brand management and creation of marketing collateral including the launch of their website. Leading the design and IT team I was instrumental in the creation and management of their investor portal infrastructure.



ABOUT

#### ABOUT BREVAN HOWARD

TIMELINE

CORPORATE STRUCTURE

LOCATIONS

PHILANTHROPY

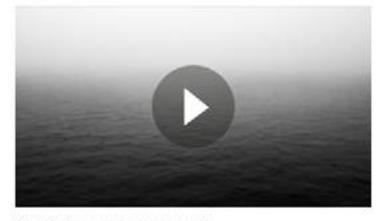
VIDEOS

Brevan Howard is one of the world's largest absolute return asset managers. It manages assets of around \$39bn on behalf of more than 650 institutional investors located in over 35 countries. Our business model is founded on three core principles; attracting and retaining the very best talent, giving them the means to unearth the opportunities, and supporting them with an unbending risk management platform as they independently trade the global markets.

Brevan Howard was founded in 2002, and over time, Brevan Howard has developed a range of absolute return strategies where the firm perceives attractive trading opportunities to exist, and where it believes it can efficiently utilise the trading talent and resources of the platform.

We have offices in Jersey, London, Geneva, Hong Kong, New York, Washington and Tel Aviv. This global presence gives Brevan Howard the ability to identify and source attractive opportunities wherever they may occur.

Brevan Howard has won several industry awards for excellence in risk management, operational robustness and investment performance



VIDEO: AN EXAMPLE OF A VIDEO ENTRY

### TIMELINE / COMPANY HISTORY

## BREVAN HOWARD



INVESTMENT CONTEXT

INVESTMENT APPROACH

RISK MANAGEMENT

OVERVIEW WHAT WE DO STRATEGIES TEAM RESOURCES CONTACT LOGIN

### INVESTMENT CONTEXT

Investment is the search for storing value. Because fixed income is no longer fulfilling this function, investors can consider: equities, credit instruments and trading.

The default choice for most investors will be equities, with its considerably higher risk. Brevan Howard is the middle ground, uncorrelated to either fixed income or equities.

Global macro trading seeks to take advantage of changes in global economies and has a natural focus on monetary policy formation, macro-economic changes, policy changes and changes to regulatory conditions as well as capital flows. Brevan Howard believes that trends in asset prices are not random, but are a function of business cycles and investor responses to the disequilibrium they produce.



PHOT

### BREVAN HOWARD

CONTACT

LOCATIONS:

OVERVIEW WHAT WE DO STRATEGIES TEAM RESOURCES CONTACT LOGIN

### INVESTMENT APPROACH

Brevan Howard employs a combination of global macro trading strategies predominantly in the fixed income and believes that extracting economic value is fundamentally effective management.

| STRATEGY LEVEL  | TRAC    |
|---|---------|
| Each Brevan Howard strategy is structured, where possible, so | Trade   |
| that it has   | airri t |
|   | limite  |
| Predetermined loss tolerances.                                | scena   |
|   | cons    |
| <ul> <li>Clearly defined time horizons.</li> </ul>            | losse   |



#### CONTACT

Investor Relations / Fund Enquiries: in@brevanhoward.com

All Other Enguiries: enquines@brevanhoward.com

Press Enquiries: Peregrine Communications Group

UK - Jonathan Wharton jonathan wharton@peregrinecommunications.com +44 (0)20 3178 6858

USA - Max Hilton max hilton@peregrinecommunications.com

#### LOCATIONS

### GENEVA - BRANCH OFFICE

Rue d'Italie 10 Geneva 1204 Switzerland





# **The Alan Howard Speaker Series**

Responsible for the creation of the brand identity for the Series and all of its touchpoints. Provided strategy for creative, advertising, messaging, photography, video and marketing of all its events. Responsible for the management and quality control of each event, the recording of each live event and the final edit. Each event was filmed, teasers were made immediately after the event followed by the full video a few days after. An integrated marketing campaign was created for each event that included print, digital and social campaigns. Monitored viewer data and adjusted content marketing to optimise reach.



The Alan Howard Foundation / JW3 Speaker Series features conversations, talks and entertainment delivered by leaders and experts in their respective fields who can provide a unique insight into their chosen topics.

The lectures are designed to cover broad areas of intellectual thought, including economics, science, history, politics and the arts. The principal aims of the series are to educate and entertain through high level conversation and debate, whilst delivering a rich, diverse and inspiring range of speaking events.

Each event will be held at JWD in London, a brand new, state-of-the-art community and cultural verse, established for the benefit of the Jewish community, the local community, and for the people of London

SHARE THIS PAGE 00000

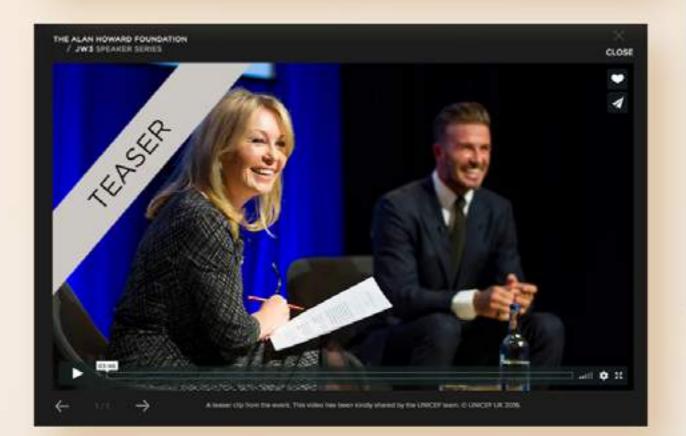
UPCOMING EVENTS .



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FILTER EVENTS







Speaking at JW3 in London on 8 May 2017, bestselling author J.K. Rowling told the audience about the singular moment that spuried her to become a prolific philanthropist

④ GO TO EVENT



Tony Blair / Tania Bryer

Former Prime Minister Tony Blair addressed a packed audience at JW3 in Hampstead on Monday 6 February. ranging across subjects as diverse as Brexit, the future of the Labour Party and the impact of radical Islam.

GO TO EVENT

GO TO EVENT



Jonathan Freedland

David Miliband and Jonathan Freedland will be discussing the global refugee crisis and how the interhational community should respond.

GO TO EVENT



Ayaan Hirsi Ali / Maajid Nawaz

Ayeen Hirsi, activist, author and politician, in conversation with Maalid Nawaz, author and Founding Chairman of Quilliam.

(+) GO TO EVENT



David Beckham / Kirsty Young

David Beckham is a former professional footballer

fashion icon and UNICEF Goodwill Ambassador

Sir Paul Nurse Dr. Adam Rutherford

Sir Paul Nurse, Nobel Laureate, and Dr. Adam Rutherford discuss 'Doing Science' and what it is like to be a research scientist.

O TO EVENT

1 2 NEXT PAGE →







Sort by: Default



Lord Mervyn / Gabriele Finaldi

Lord Mervyn King, former Governor of the Bank of England and Chairman of its Monetary Policy Committee and current Trustee of the National Gallery, in conversation with Gabriele Finald, Director of the National Gallery in London.

④ GO TO EVENT



Edmund de Waal Edmund de Waai is a British artist and author of The-Hare with Amber Eyes.

GO TO EVENT.



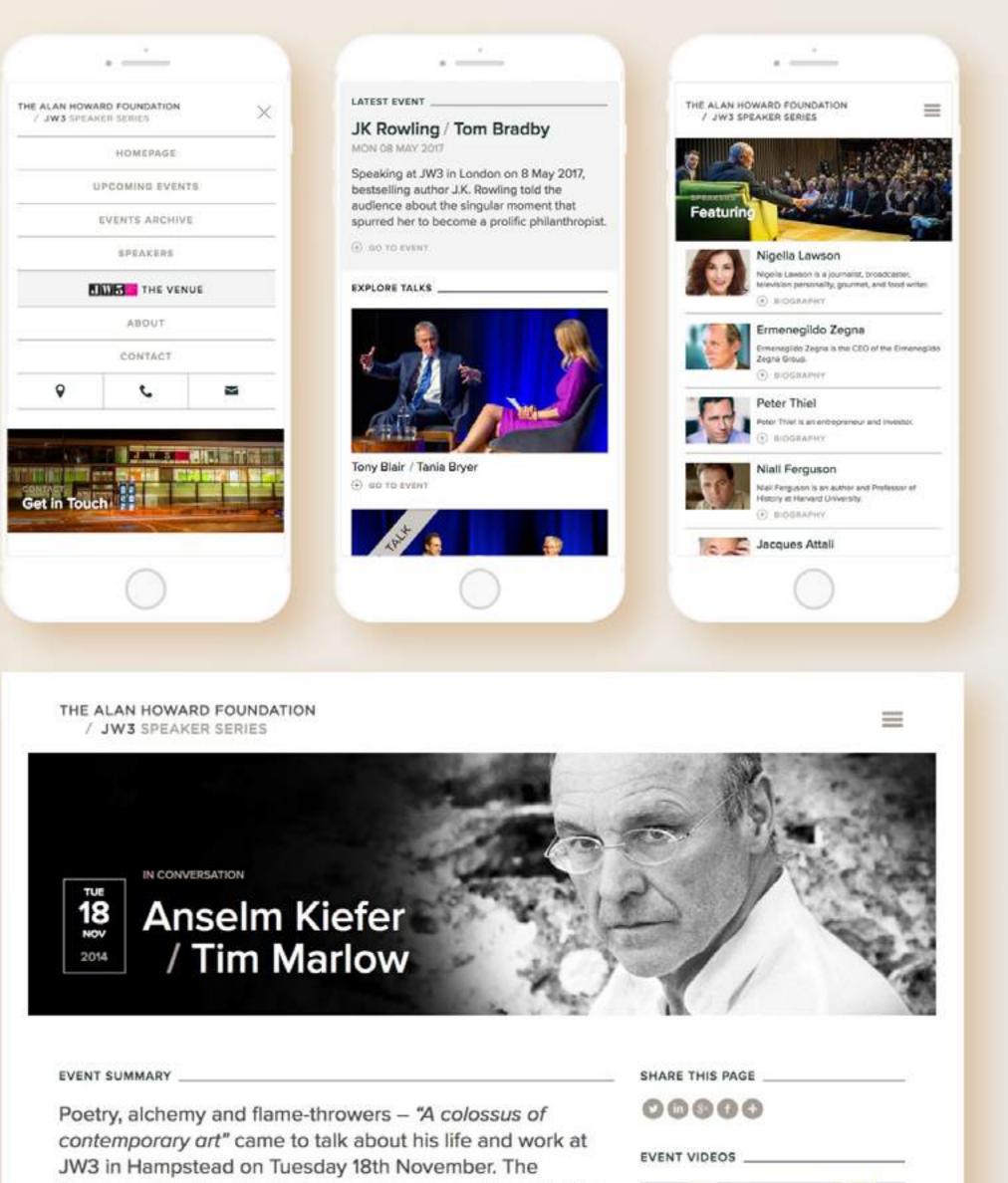


Nigella Lawson / Sam Baker Nigelia Lawson talked about her new book 'Timply

Nigelia: Feel Good Food, and her relaxed and accessible attitude to cooking.

(F) OD TO EVENT







German artist, Anselm Kiefer, was in conversation with Tim Marlow, the art historian and commentator on the contemporary cultural scene who became the Royal Academy's Director of Artistic Programmes, in April this year.

This was a rare talk given by Kiefer while the Royal Academy holds the first ever retrospective of his work which ends of December 14th.

The artist creates giant, densely textured, paintings, sculptures and installations at his 35,000 square meter studio in Paris, using a wide variety of materials, ranging from straw and lead to



EVENT PHOTOGRAPHS







#### NINE GENERATIONS OF THE GUINNESS FAMILY

one of the world's first family offices the protection and growth of their Arthur Gainnets & Son Ltd

WEAGH

In 1886 the Earl of Iverall established Today Iveragh offers investors seeking to protect the fortune which come assets this unique combination of from the stock exchange Risting of investment experience and investment expertise enabling future generations to enjoy the wealth.

# **Guinness Family** Investment **Management Rebrand**

Responsible for the creation of the brand identity and product marketing collateral (print & digital) for the investment arm of the Guinness Family, offering investment opportunities to external investors.

#### UNDERSTANDING INVESTOR NEEDS IN CHANGING MARKET CONDITIONS

funds seeking to achieve conital bad market conditions.

liveopo provides investment Our primary objective is to preserve management services designed to and enhance our clients' wealth. We meet clients' differing needs, by seek to manage risk and provide offering a range of mestment protection and growth in both good and growth with controlled volatility. Our proven, disciplined and methodical investment process is based on our proprietary macro-economic models, together with our superior market intelligence, market valuations and technical analysis, enabling us to provide investors with a range of

solutions to meet their needs.



### 4" Earl of Iveagh Chairman, Iveagh Ltd

Arthur Edward Guinness

## IVEAGH CAUTIOUS PORTFOLIO

growth who are willing to take a low level of risk and volatility.

FUND DESCRIPTION - IVEAGH CAUTIOUS PORTFOLIO (RISK 3)

This fund seeks to achieve long-term capital growth by investing in a diversified range of asset classes. The risk profile is cautious and is suitable for investors seeking capit-

lveage'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, treagh manager

All livesgft Core Portfolios benefit from livesgft's dynamic risk management which aim

to emphasise capital preservation when the investment process identifies a significant

risk of major market falls. This is achieved by temporarily reducing the risk profile by up to three risk levels. Importantly the portfolio risk level can sever rise above the

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investment in the Fund puts your capital at risk and past performance is not a guide to

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2.9% Corporate & Emerging Market Bond

8.0% Government Bunds

4.9% Gold and Precisus Mets

35.9% Public Enalty

6.0% Absolute Return

2.2% Private Douby

10.4% Property 1.9% Alternative lives

1.1% Commodities

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your chosen investment portfolio to meet your financial goals and objectives.

IVEAGH CAUTIOUS PORTFOLIO - CURRENT RISK PROFILE

This fund is corrently at its optimal risk profile.

DISCRETE ANNUAL PERFORMANCE

**CUMULATIVE PERFORMANCE** 

CURRENT ASSET ALLOCATION

FUND FACTSHEET AUGUST 2012

RISK MANAGEMENT

standard level.

future returns.

TVEAGH

IVEAGH INVESTMENT INDICATORS aut 314 July 2013 Aaces Modelal Leading econemic indicators Market positioning, conse specialist inputs Valuation: 6 Equities, bonds, commines coviatio-diffues Technical Analysis: Trends and significant price level

#### IVEAGH INVESTMENT PROCESS Our investment process is designed to give clear

signals of when decisive action needs to be taken in portfolics, with a perticular emphasis on capital preservation.

We start with our proprietary macroeconomic leading indicators which give signals on the direction of key economic drivers, particularly growth and inflation. We then evaluate the ential market impact through three additiona indicator sets: Market Intelligence (liquidity and fund flows), Valuation, and Technical Analysis. This allows our investment team to sift through the mountain of available information in an objective and methodical way, promoting consistent and clear-sighted decision-making. The output of the process is espressed as a traffic light system, each light relating to one of the four key indicator sets.

Bearse (sear

CONTACT US Telephone: +84 (0120 7808 1400 Facaimile: +44 (0)20 7808 1401 Email: enquiries give aghind core

YOU CAN ALSO WRITE TO US AT: Ivesgh Limited 21 Queen Anne's Gate Landon SW1H 98U United Kingdom

further information and documents about liveagh's range of funds can be frond at: www.iveaghltd.com



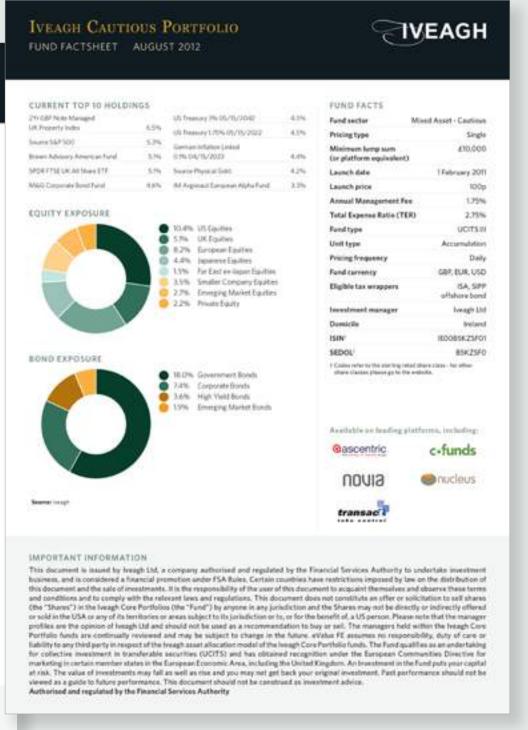
We are wholly dedocated to the liveagh is the privately owned. protection and prowth of our investment management business that

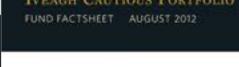
clients' wealth for commit evolved from the family office of Arthur and Arture periodicins. Edward Guinness, Earl of fveagh, and other members of the Guinness fac Through our regulated investment funds, retail investors can access the same investment expertise that we have used to managed the Guinness family money for generations.

# ACHIEVING LONG-TERM FINANCIAL SUCCESS

IMPORTANT INFORMATION

viewed as a guide to future performance. This document should not be construed as investment advice.



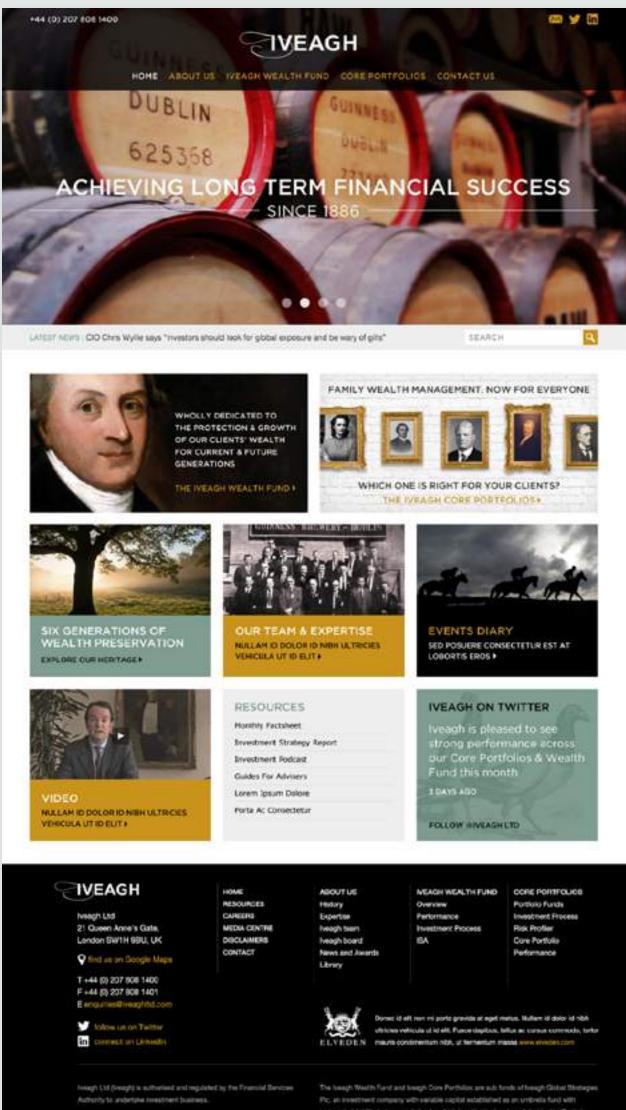








## **Guinness Family Investment Website**



THE IVEAGH CORE PORTFOLIOS WHICH ONE IS RIGHT FOR YOUR CLIENTS? JASMINE GUINNESS DESIGNER & FASHION MODEL INCOME PORTFOLIO > LATEST NEWS : CIO Chris Wylle says "investors should look for global exposure and be wary of gits 📾 😏 🖬 +44 (0) 207 808 1400 HOME ABOUT US IVEAGH WEALTH FUND CORE PORTFOLIOS CONTACT US OUR HERITAGE EXPERITIEE IVEACH TEAM IVEACH BOARD NEWE'S AWARDS IVEACH MEDIA OUR HERITAGE SIX GENERATIONS OF WEALTH PRESERVATION In 1886 the 1st Earl of Iveagh established one of the world's first family offices to protect the fortune arising from the flotation of the family's brewing business. In 2006 the first Earl's great-great-grandson, Edward Guinness, Earl of lveagh, continued the tradition of pioneering wealth preservation when he and other members of the Guinness family joined with a team of alternative investment experts to create lveagh. HOME > ABOUT US > OUR HERITAGE SEARCH я, ARTHUR EDWARD CECIL HENRY GRATTAN RENELM LEE RUPERT EDW ARD JASMINE GUINNESS 1725-1005 GUINNESS 1847-1927 GUINNESS 1887-1937 CECIL GUINNESS 1674-1967 GUINNESS 8. 1976 GUINNESS 1935--1910 JASMINE GUINNESS LOREM IPSUM DOLOR SIT AMET



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IVEAGH

SEARCH

OUR HERITAG

SIX GENERATIONS

OF WEALTH PRESERVATION

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in 2006 the first Earl's great-great-grandson.

he and other members of the Guinness family

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joined with a team of alternative investment

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IVEAGH

OUR MENTALS COMMITTEE INTACT TOTALS STATE OF LASS BUILDED. AND

OUR HERITAGE



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## **Cognito Creds Deck**

Print run of 5,000 distributed throughout APAC, EMEA & USA

Following on from the contemporary colour scheme, imagery, typography and graphics created for the WOM publication. A 'Credentials' booklet was designed to promote Cognito's "Finance Is Different" concept as well its services and global reach.



### About Cognito

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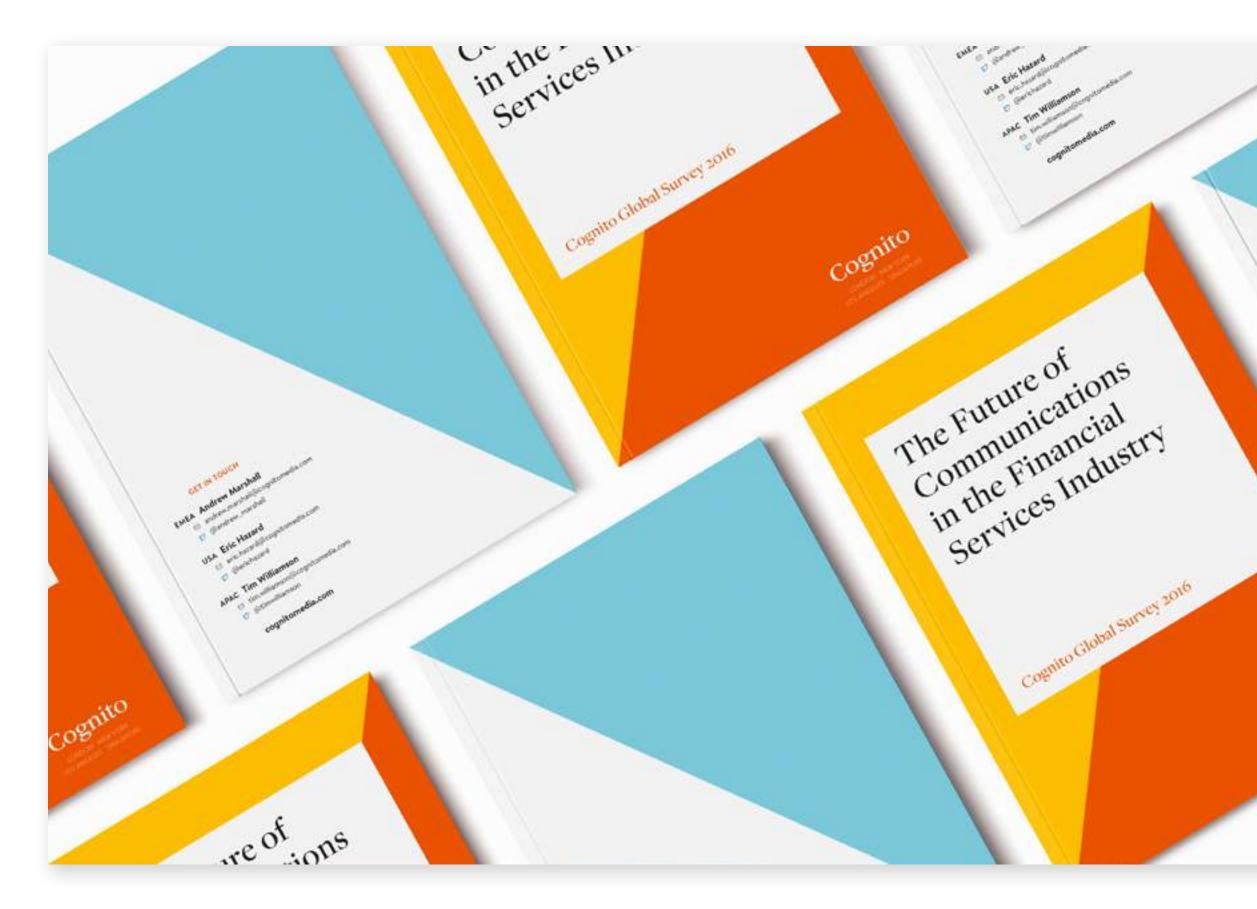
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### Our Services

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## **Cognito Global Survey**

159 Professionals across USA, Europe & Asia

Marketing professionals of Financial Services & FinTech companies were asked their views on a range of subjects from current priorities to marketing spend to talent, and where they see the communications landscape developing in the future. A print and digital publication was created and a Breakfast event organised to showcase the findings of the Survey.



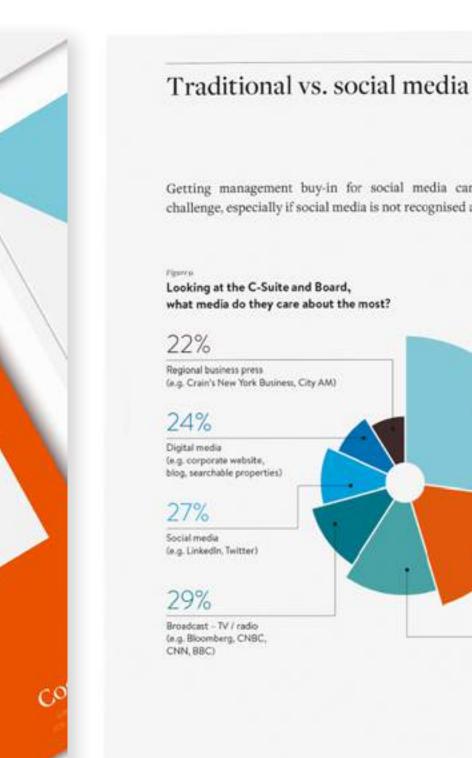
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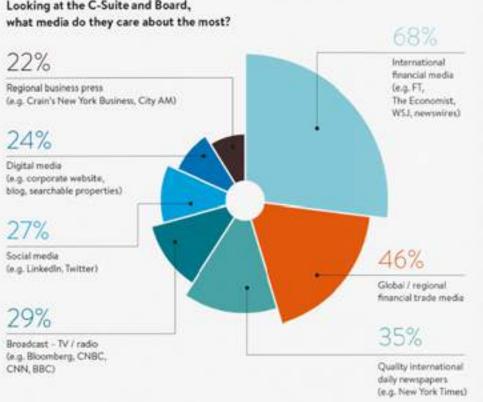
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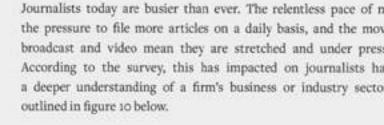




16 Coppto Global Survey 2016

Getting management buy-in for social media can be seen as a challenge, especially if social media is not recognised as a high priority.



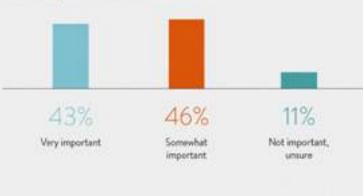


### How well do journalists understand your industry sector?

| Journalist understanding | High | Medium | Low/uns |
|--------------------------|------|--------|---------|
| Your firm's business?    | 23%  | 57%    | 20%     |
| Your industry sector?    | 32%  | 61%    | 7%      |
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Perhaps more surprising is the growing importance of indu influencers as 89% of respondents believe these influencers important to the success of marketing and communical programmes.

How important are industry influencers to your communications programme (e.g. academics, industry analysts, professional advisors. think tanks, social influencers)?



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### The importance of social: perception vs. reality

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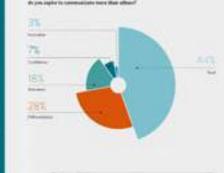


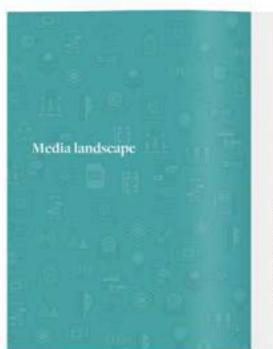
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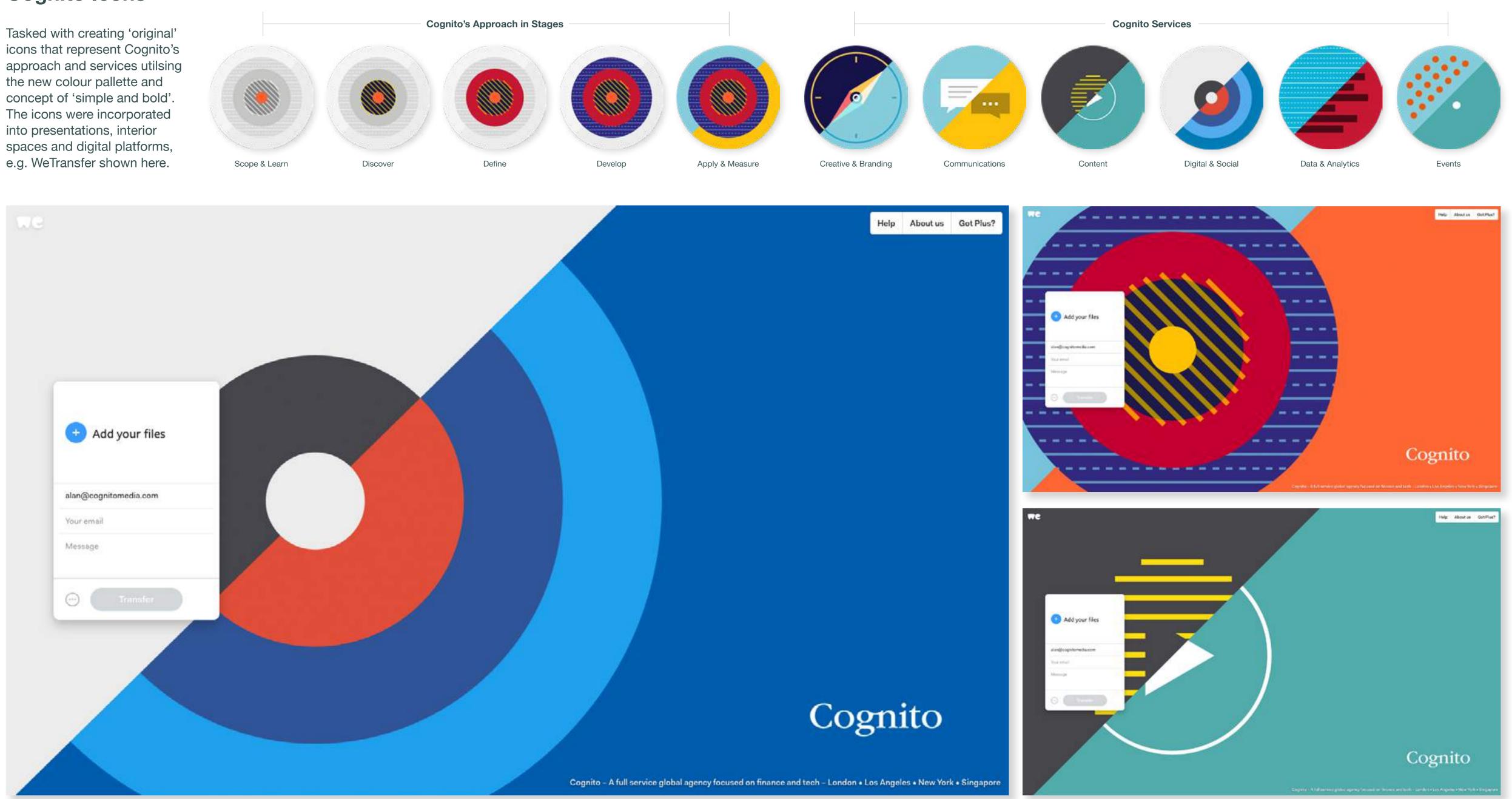
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## **Cognito Icons**

icons that represent Cognito's the new colour pallette and concept of 'simple and bold'. The icons were incorporated into presentations, interior spaces and digital platforms,





## **"How Risky Is Your Stock Market?**" Animation

\$450m AUM, 1,000+ YouTube views

The Peregrine team was commissioned by Victor Haghani, Founder of Elm Partners and TEDx Speaker to produce a thought-leading animation as part of their Investment Series. It highlights the importance of equities to any investment portfolio and the focus on managing risk.

Scripting, concepting, content, storyboarding, illustrations and editing were all crafted in house. We adhered to the style of the drawings used in Victor's previous TEDx talk animation as well as adding new elements in line with Elm Partners brand guidelines.

The hand-drawn illustrations underwent a complex process to be turned into multiplelayered animations and to create motion in each individual scene.

The level of engagement and interest in Elm Partners' investment offering greatly increased in comparison to previous video posts. Within the first week of posting, it received 150 views on LinkedIn and 1,000+ views on YouTube.

"Just wanted to let you know that we posted the 'How Risky Is Your Stock Market?' video on Friday, and we've already received a lot of positive feedback, and plenty of people are asking how we created such a great video. We know the Peregrine team went way beyond the call of duty in the work and careful thought that went into this project, and we really appreciate it. Well done, and thank you."

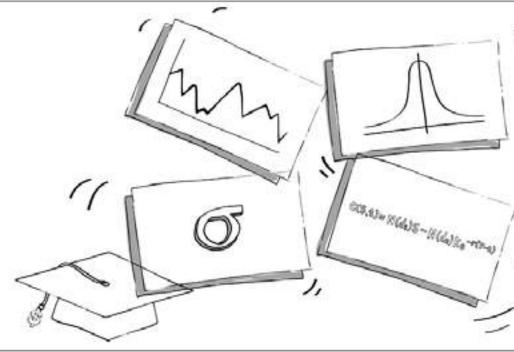
Victor Haghani, Founder of Elm Partners.













## **Peregrine Rebrand**

Integrated Communications

Charged with revolutionising the identity, branding, strategy and messaging – transforming a PR agency into an integrated marketing and communications agency.

An illustration of the Peregrine bird was commissioned and a new strapline "Communicate. Words. Pictures. Actions" was created for the rebrand. The rebrand of Peregrine rolled out on all touchpoints from the interior design of their Camden office to their presentations, stationery and website. The rebrand received an award for its innovation.



Corporate Identity prior to the rebrand



10

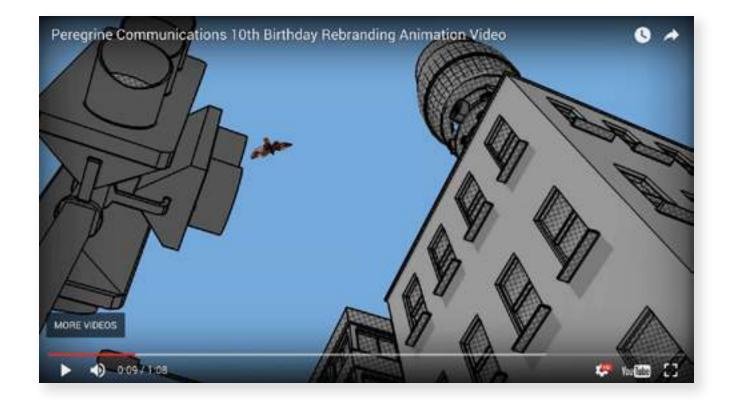
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## **Peregrine's Party Animation**

**10 Years Celebration** 

I embarked on creating an animation that showcased the 'evolved' Peregrine Communications bird flying through the City of London (its territory) as well as demonstrating Peregrine's new rebrand and mantra of "communicate. words. pictures. actions."

The animation was produced to a tight deadline of two weeks. It premiered at Peregrine's 10th Birthday party at the Ivy Club as an introduction to the new rebrand prior to the CEO's speech.







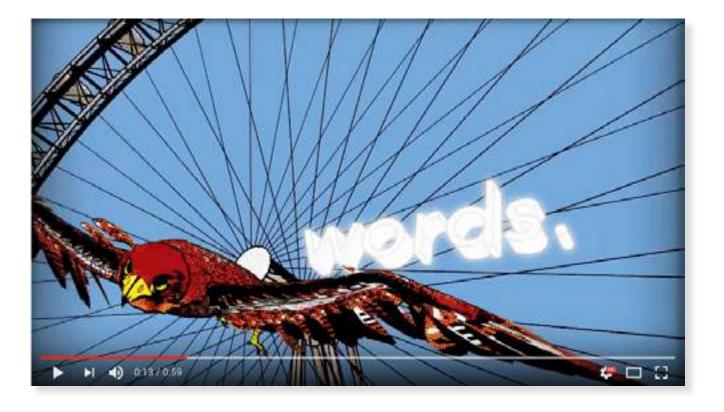


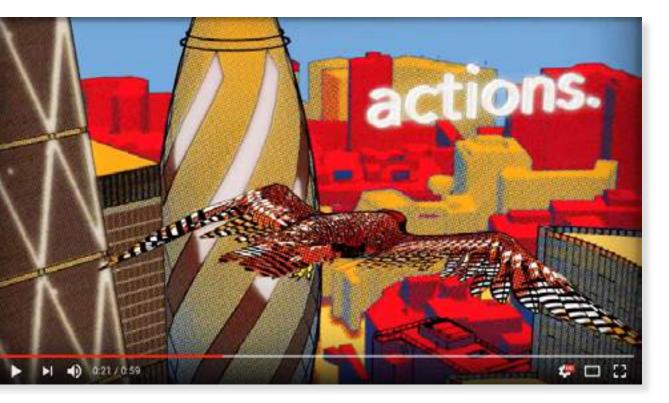












## Peregrine®

communicate. words. pictures. actions.

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## **Amnesty International**

2007 - 2009

Hands-on designer for the Amnesty International Secretariat Global Major Donors Program, aimed to develop operations in local Amnesty offices and assist in building a global partnership of high-profile donors willing to invest in the longterm expansion of Amnesty International.

Provided creative direction for the program, designed the Major Donors Program brochure, collaborating with Magnum Photos and managed the printing of the brochure in every language. A digital campaign supported the Program as well as a variety of leaflets, animation and marketing collateral.



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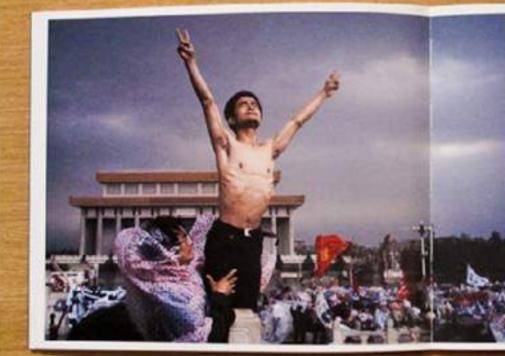
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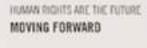
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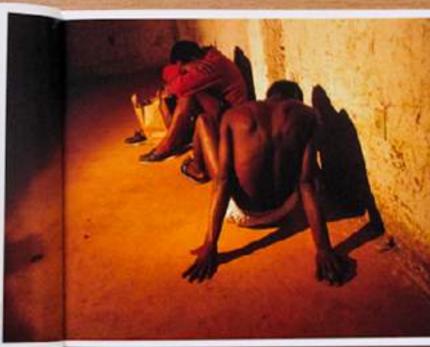
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## University of the Arts London / Central Saint Martins / Drama Centre London

2000 - 2010

Responsible for the photography of theatre productions and design of UAL, CSM and DCL marketing collateral.

















## surreo

2006

Responsible for the naming, branding and creative direction of Italian artist Sergio de Benedittis' "surreo" photographic exhibition in Rome. Designed and produced all of the event marketing literature, signage, invites, tickets, event space and brochureware.



EXPERIENCE

Light stimulates, defines and excites us. It conditions both Light stimulates, dennes and excites us it conditions both the way we see and the way we feel, making it the most important tool to consider in architecture and design.

### LightIQ Brochureware 2006

Responsible for the creative direction, design and print production of this promotional brochure showcasing LightIQ's extraordinary colourful lighting capabilities.





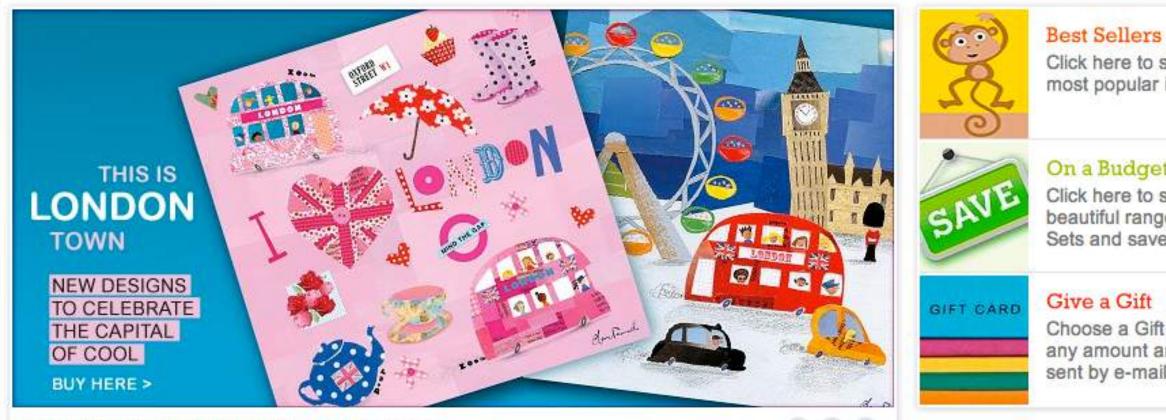


0 SEARCH FOR ART ...

1-15 OF 210 PRODUCTS

EXCLUSIVE ART FOR CHILDREN

### Artworks Artists Gift Cards Happy Sets



I Heart London Canvas Print BY CLARE FENNELL





### Welcome to the Happy Spaces Online Art Gallery

We specialise in art for children's spaces. Happy Spaces brings you a collection of colourful and imaginative wall art for kids by some of the world's finest artists.

We pride ourselves on offering art that is refreshingly different and fun for children! Exciting adventures, fabulous stories and lovable characters, are all here waiting to be discovered by your child through the medium of art.

All our pictures, reproduced on cotton canvas, are made with love and are exclusive to Happy Spaces. Each canvas is expertly finished, beautifully wrapped and supplied with a specially designed postcard.

STOCKISTS BLOG GBP T Basket > 0 items, £0.00

Click here to see our most popular items.

### On a Budget?

Click here to see our beautiful range of Happy Sets and save.

Choose a Gift Card for any amount and get it sent by e-mail or post !

< PREVIOUS NEXT >

### FREE DELIVERY \* on uk orders over £120



NEXT IN GALLERY >

ABOUT THE ARTIST

### Clare Fennell

Clare was born and raised in Hertfordshire, before moving to Leicester where she obtained a BA Hons Degree in Graphic Design and Illustration at De Montfort University, Having graduated, Clare worked for many years in the Greetings Card industry, designing Read more ...

Happy Spaces

**Online Art Gallery** 

Provided creative direction on

identity, branding, marketing

collateral, packaging and the

art for children's rooms.

design and build of e-commerce

online art gallery, selling exclusive



### London Town Canvas Print BY CLARE FENNELL

This is London! Celebrate the capital of cool and take home this stylish canvas print showcasing the delights of "London Town". Enjoy exploring the capital together with your little ones as you point out its big red buses, cool cabbies and Queen's guard. Take a ride on the London Eye and pop in to see Big Ben and the Houses of Parliament on the way. Contemporary, colourful, cultured, - we love it!

appy Sets

African Sunshine

Specifications:

- + 50 x 50 x 2 cm (20 x 20 x
- · Giclée cotton canvas print
- · Stretched around a woode
- Hanger attached for wall m

### CUSTOMER REVIEWS

Kirsty Pearson Location: London Artistic Impressions Best Friends Boys will be Boys City Bird Country Bird Colourful Kid Eco Girl Fabulous Fairies Fairy Fun Girly Dress Up Going Vintage Hit the Deck I Wanna Be ... Neil and Spike Patchwork Friends Peek-a-Boo Pals Playmate Classics Polariod Pala Ready Steady Go Retro Kid Retro Posters Retro Robots Special Bonds Story Time Bliss Sunny Days The Adventurous Owl Things that Go Up, Up and Away

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HappySpaces

Artworks Artists Gift Cards Happy Sets YOUR LITTLE ONE'S ART GALLERY

Home > Happy Sets > City Bird Country Bird

SEARCH FOR ART.



### City Bird Country Bird BY ELLEN GIGGENBACH

Representing love, joy and all things happy, this striking pair of birds let you bring home a little City and a little Country! Originally designed by popular artist Ellen Giggenbach in her iconic style of 'cut paper art', using graphic shapes and painted in beautifully bright acrylic hues. Timeless and totally unique we recommend this pair as the perfect finish for a stylish nursery!

Kids Wall Art Specifications:

- · 2 canvas prints in this Happy Set.
- Prints measure 50 x 50 x 2 cm (20 x 20 x 0.8 in)
- · Giclée cotton canvas prints, finished on all sides
- Streched around a wooden frame (FSC approved wood)
- Hanger attached for wall mounting







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Basket > 0 items, £0.00

## EVENT PHOTOGRAPHY BUSH THEATRE Shepherd's Bush, London







## EDITORIAL PHOTOGRAPHY THE WESTBURY RESTAURANT MAYFAIR, LONDON











# Let's Talk

Email alan@kamilian.com

Mobile +44 7399 770455

### in alan-pitchforth

ilianpitchforth.co.uk