

Investment Committee

The fund manager, Richard Oldfield of Oldfield Partners, wrote a book called, “**Simple, But Not Easy**” when referring to the art of managing investments. The *simple* element is starting with a set of investment beliefs which define how you think money should be managed. The *not easy* part is how to identify your chosen managers from the thousands of listed and unlisted funds around the world which include Unit Trusts, OEICs, SICAVs, Investment Companies, Hedge Funds and Mutual Funds. And once identified, continually monitoring them to ensure they are meeting your requirements.

Furthermore, analysing the performance of professional fund managers must also sit alongside acceptable levels of risk to achieve a particular investor’s goals.

The **EXE** Capital Management investment team is assisted in these tasks by the Investment Committee, a group of independent consultants with a wealth of industry experience in fund manager identification and monitoring. It is chaired by **Andrew Humphries** who had previously headed up the investment function of St. James’s Place, presiding over the aforementioned tasks and over a period when the funds rose in value from £6 billion to £120 billion.

Alongside him sits **Ben Yearsley** and **Gavin Hayes** of **Fairview Investing**, both held in high regard within the industry and financial media. Ben was an integral part of the investment research team at Hargreaves Lansdown when it was first launched and Gavin was managing

director of Whitechurch Securities, an award-winning investment boutique and is recognised as a leading authority on portfolio management and construction. Part of their remit is meeting with between 200 and 300 managers each year to delve into what those managers are thinking, gaining invaluable insight that is not otherwise available to the private investor.

EXE Capital Management can also draw upon the extensive research offered to us through our association with Raymond James Investment Services, part of the US listed firm Raymond James Financial which manages nearly US\$ 1.5 trillion funds. Additionally, their own third-party aggregation platform offers research from ten further analyst firms including Numis, Stifel and Peel Hunt as well as Charles Stanley.