



Motive Partners Invests in Mobius to Build the Future of Pension and Wealth Investment Infrastructure

Investment positions Mobius at the center of the convergence between pensions, wealth, and private markets – unlocking scalable access to modern investment strategies

New York and London, June 11, 2026 – Motive Partners (“Motive”), a specialist private investment firm focused on financial technology, today announced a strategic investment in [Mobius](#), a leading UK based pension investment platform, to accelerate the development of next-generation investment infrastructure across pensions and wealth. Motive purchased Mobius from Phoenix Equity Partners, and the transaction is expected to close later this year, subject to customary closing conditions.

Mobius is a differentiated, independent investment platform serving institutional and wealth clients across defined benefit (DB), defined contribution (DC), and personal pension (SIPP) markets. With more than 600 clients, over £30 billion in assets under administration, and connectivity to 100+ investment managers, Mobius enables clients to design, manage, and deliver complex pension and retirement solutions with speed, flexibility, and efficiency.

The partnership directly aligns with Motive’s wealth and asset management investment thesis, centered on the convergence of public and private markets, the democratization of alternatives, and the growing need for modern, connected infrastructure across the investment lifecycle.

With Phoenix’s support, and through its UK life company structure and open architecture platform, Mobius has developed capabilities including fund wrapping, blending, and unitization, allowing clients to combine traditional and alternative assets into scalable, customized solutions. This positions Mobius as critical infrastructure for a pensions and wealth market focused on delivering improved investment outcomes.



The investment also advances Motive’s broader ecosystem strategy in wealth and asset management, where the firm has built a front-to-back view of the investment value chain – spanning pre-trade data and connectivity, execution, product manufacturing, and post-trade processing. Mobius strengthens this ecosystem by adding differentiated product structuring and distribution capabilities, particularly across pensions and long-term savings.

As with all its investments, Motive Partners will bring a differentiated investor–operator–innovator (IOI) model to its partnership with Mobius, combining capital with operational expertise and technology-led transformation capabilities, to work closely with the Company to execute a comprehensive value creation plan focused on growth, innovation, and scalability.

“We are excited to partner with Mobius at a pivotal moment in the evolution of wealth and pensions,” said **Scott Kauffman, Founding Partner, Head of Investments at Motive Partners**. “Our investment thesis is grounded in the belief that wealth and asset management is being reshaped by the rise of alternatives, increasing complexity of products, and the need for modern infrastructure. Mobius has built a distinctive platform that enables this shift – connecting asset managers, pension schemes, and wealth platforms through flexible, open architecture.”

Motive’s investment comes at a time when the UK pensions and wealth market is rapidly growing, and undergoing significant structural change, including consolidation, an increasing allocation to private markets, and a growing need for more effective accumulation and decumulation solutions.

“We believe Mobius is well positioned to help shape the future of wealth and retirement investing,” said **Neil Cochrane, Partner at Motive Partners**. “As demand grows for private markets access, more personalized investment solutions, and modern infrastructure, Mobius is a category leader at the intersection of those trends. We’re excited to partner with the team to support the company’s next phase of international growth, expand its capabilities, and further strengthen connectivity across the investment ecosystem.”

“Motive is the ideal partner for the next phase of our growth,” said **James Finch, CEO of Mobius**. “Mobius is an established, innovative business with a unique position in the UK pensions market. With Motive’s investment and experience, we can accelerate development of our platform and capabilities for the benefit of clients. Global demand for better pension and retirement outcomes is increasing, driving the need for more advanced investment infrastructure and deep operational expertise. With Motive’s support, I’m excited about the role Mobius will play in the future of pensions and wealth.”



“At a time when pension systems and wealth platforms are evolving rapidly, the need for flexible, scalable investment infrastructure has never been greater,” said **Steve Groves, Chair of Mobius**. “Mobius has built a distinctive position at the intersection of pensions, wealth, and private markets, helping clients access increasingly sophisticated investment solutions through a modern, open-architecture platform. Motive Partners brings deep sector expertise, a strong global network, and a shared vision for the future of investment infrastructure. We are delighted to welcome them as a strategic partner as we accelerate the next phase of growth for the business.”

Lazard, Oliver Wyman, Proskauer and PwC acted as advisors to Motive Partners.

About Mobius

Mobius is an institutional investment platform providing administration services to over 600 clients, representing more than £30bn in assets under administration across the pensions and wealth sectors. Its independent, open architecture model gives clients access to a broad range of investment opportunities, enabling them to design, manage and deliver pension and retirement solutions tailored to evolving needs. By combining flexible, scalable infrastructure with deep sector expertise, Mobius supports the implementation of investment strategies across both public and private markets. More information can be found at <https://mobiuslife.co.uk/>.

About Phoenix Equity Partners

Phoenix is the UK’s leading mid-market backer of founder-entrepreneur-owned businesses, having successfully worked with 60 founders over the last two decades. Our philosophy is rooted in nurturing founders, their teams, and the entrepreneurial businesses and cultures they have built. More information can be found at www.phoenix-equity.com.

About Motive Partners

Motive Partners is a private investment firm exclusively focused on financial technology and technology-enabled business services companies, investing from early-stage ventures to growth equity and buyout in North America and Europe. The firm invests across five subsectors: banking & payments, capital markets, data & analytics, insurance, and wealth and asset management. Motive Partners applies its proven investor, operator, innovator (IOI) model across its portfolio, combining deep financial technology expertise and proven operational rigor to accelerate growth and value creation. With offices in New York, London, and Berlin, the firm provides differentiated insight, connectivity, and capabilities to create long-term value in financial technology companies. More information on Motive Partners can be found at www.motivepartners.com.



Motive Partners is a specialist private equity firm focused on technology-enabled businesses in financial services. Motive Capital Management LLC is a registered investment adviser with the US Securities and Exchange Commission. It is not authorised or regulated by the Financial Conduct Authority. This press release contains forward-looking statements. Actual results may differ materially from those anticipated. Past performance is not a reliable indicator of future results. Nothing herein constitutes an offer to sell or solicitation of an offer to buy interests in any Motive managed investment vehicle. Directed at professional investors only.

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