



Motive Partners Completes Acquisition of Mobius to Advance the Future of Pension and Wealth Investment Infrastructure

Transaction is intended to support Mobius' next phase of growth and delivery of scalable, modern investment solutions across pensions, wealth and private markets.

New York and London, October 27, 2026 – Motive Partners (“Motive”), a specialist private investment firm focused exclusively on financial technology and tech-enabled business services, today announced the completion of its acquisition of Mobius (“the Company”) a leading UK-based pension investment platform, from Phoenix Equity Partners. With all required regulatory approvals received, completion marks the beginning of Motive’s partnership with Mobius as the Company enters its next phase of growth and innovation.

Mobius is a scaled, independent, open-architecture investment platform in the UK, serving both workplace pensions (Defined Contribution and Defined Benefit) and Self-Invested Personal Pensions. With more than 600 clients, over £36 billion in assets under administration and connectivity to more than 100 investment managers, Mobius enables clients to design, manage and deliver complex and bespoke pension and retirement investment products with speed, flexibility and efficiency.

Structured as a UK life insurance company, Mobius is distinctive in its ability to offer bespoke unitized fund products that combine traditional and alternative assets in a wrapper designed to be tax-efficient. This positions Mobius as important infrastructure for the future of a pensions and wealth market that is increasingly focused on delivering better long-term investment and retirement outcomes.

The partnership directly aligns with Motive’s Wealth & Asset Management investment thesis, centered on innovation in pension investment products, broadening the range of investment options, including private markets, available to pension schemes and wealth platforms, the UK regulatory focus on retirement outcomes and the demand for modern, connected investment infrastructure.



“Motive is delighted to complete this investment and formally welcome Mobius to our portfolio,” said **Scott Kauffman, Founding Partner, Head of Investments at Motive Partners**. “Mobius has established a distinctive position in an increasingly important part of the financial services ecosystem: enabling pension schemes, wealth platforms and asset managers to bring more sophisticated investment solutions to market. We look forward to supporting James Finch and the team as they build on that foundation and pursue the significant growth opportunities in pensions and wealth.”

Motive will apply its proven Investor-Operator-Innovator (IOI) model to the partnership, combining capital with deep sector expertise, operational capabilities and technology-led transformation support. Together with the Mobius leadership team, Motive seeks to advance growth, innovation and scalability while further strengthening Mobius’s connectivity across the investment ecosystem.

“The completion of this transaction is an important milestone for Mobius,” said **James Finch, CEO of Mobius**. “We are excited to begin this new chapter with Motive Partners, whose deep expertise across financial technology, wealth and asset management makes them an especially strong partner for our business. As our clients navigate evolving investment needs, including greater demand for private markets and more tailored retirement solutions, we are well positioned to continue enhancing the capabilities and service they rely on.”

“Mobius has a clear opportunity to help define the next generation of pension and wealth investment infrastructure,” said **Neil Cochrane, Founding Partner, Investments at Motive Partners**. “The market is evolving quickly, driven by increasing product complexity, private markets adoption and the need to improve outcomes for pensioners. We are excited to work alongside the Mobius team to expand the platform’s capabilities, deepen its market reach and help clients meet these changing demands.”

Steve Groves, Chair of Mobius, added: “Today marks a strong vote of confidence in the Mobius team, our platform and the opportunity ahead. Motive shares our conviction that the pensions and wealth market requires flexible, scalable infrastructure capable of supporting increasingly sophisticated investment strategies. Their global network, operational experience and sector specialization will be highly valuable as we continue to serve clients and grow the business.”

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



About Mobius

Mobius is a leading independent investment platform serving the UK pensions and wealth markets. Supporting clients across Defined Benefit, Defined Contribution and Self-Invested Personal Pension schemes, Mobius enables master trusts, pension schemes, asset managers and wealth providers to design and deliver tailored investment solutions at pace. Through its UK life company structure, Mobius is able to blend, wrap and unitize any combination of traditional and alternative assets, including private markets, into a single, daily-priced, tax-efficient fund for inclusion in pension and wealth portfolios. The open-architecture model gives clients access to a broad range of funds, supported by an integrated platform offering fund solutions, investment administration, dealing, and data and reporting. Mobius is headquartered in London.

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 & 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 can be found at www.motivepartners.com.

Motive Capital Management LLC is a registered investment adviser with the U.S. Securities and Exchange Commission. It is not authorized or regulated by the Financial Conduct Authority. Mobius is a portfolio company of funds managed by Motive. This press release has been prepared by Motive and does not constitute an endorsement of Mobius's products or services by any third party. Statements attributed to Mobius's Chief Executive Officer and Chair reflect their own views; they lead a company controlled by Motive-managed funds [and received no compensation from Motive for these statements]. Mobius's business strategy is distinct from the investment strategy of any Motive-managed vehicle. Mobius operating metrics are based on Mobius-reported data and have not been independently verified by Motive. 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.

For more information please contact:

Motive Partners

Britt Zarling

Managing Director, Marketing & Communications

+1 414 526 3107 | britt.zarling@motivepartners.com

Mobius

Mark Locke

MD of communications, the lang cat

marklocke@thelangcat.co.uk