

For Investment Professionals Only

Working with you: Marketing examples

December 2020

Square Mile work in partnership with a number of asset managers to support their businesses and marketing campaigns. Below are some examples of how we have worked with existing clients through bespoke marketing initiatives.

Website promotion

Asset managers have used their websites to house videos, ratings logos and content from Square Mile as a way of providing third party endorsement. Square Mile can work with you to help position this content or provide you with the imagery and videos – in whatever format you require. Some examples include:

1. A featured fund webpage that includes a view from Square Mile alongside a Talking Factsheet video.


What is a short duration bond?

A short duration bond is a bond with a short time to maturity. In the sterling market we define this as a bond maturing within the next five years, in order to access an optimal level of market depth and diversification. The short duration maturity profile may differ slightly for deeper fixed income markets, for example within the US or European credit markets short duration is more likely to be considered as bonds maturing within the next three years.

The **concept of duration** is very important for fixed income investors as it essentially measures how sensitive a bond's price is to interest rate movements. Buying a corporate bond with a lower maturity provides investors with not only a lower duration but also a lower spread duration. This means that the bond will exhibit a lower sensitivity to changes in government bond yields as well as credit spreads. Short duration bonds can therefore be a very useful tool in managing the risks of rising yields and market volatility.

View from Square Mile Research

In this Talking Factsheet from the Square Mile Academy of Funds, Head of Risk Based Solutions Research Alex Farlow, outlines his view of the AXA Global Short Duration Bond Fund and reviews the Fund's objectives and risks.



Featured funds

- AXA Sterling Credit Short Duration Bond Fund
- AXA WF Emerging Markets Short Duration Bond Fund
- AXA Global Short Duration Bond Fund

Diversified sources of yield

Tomorrow, yield won't come from the same old places. It is time to think differently...

DISCOVER MORE

Fund centre

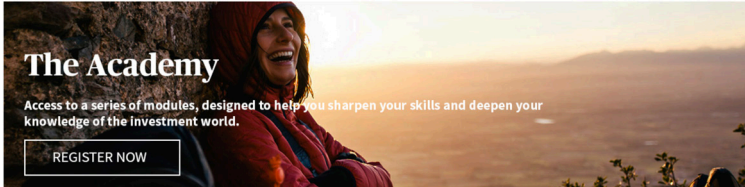
For the latest fund information, prices, performance, regulatory documents and more.

VISIT NOW

2. Contribution to CPD articles, videos or webinars to provide an educational perspective.

CPD for investment professionals

In this section you can access structured and unstructured CPD material to help you meet your 35 hours of annual CPD requirements.



The Academy

Access to a series of modules, designed to help you sharpen your skills and deepen your knowledge of the investment world.

REGISTER NOW

Active Management

With passive funds becoming increasingly popular due to their low-cost nature, what are the benefits of investing in active funds?

FIND OUT MORE

Beyond bond basics

Traditionally, investors have used bonds as an equity hedge, but can they be more exciting?

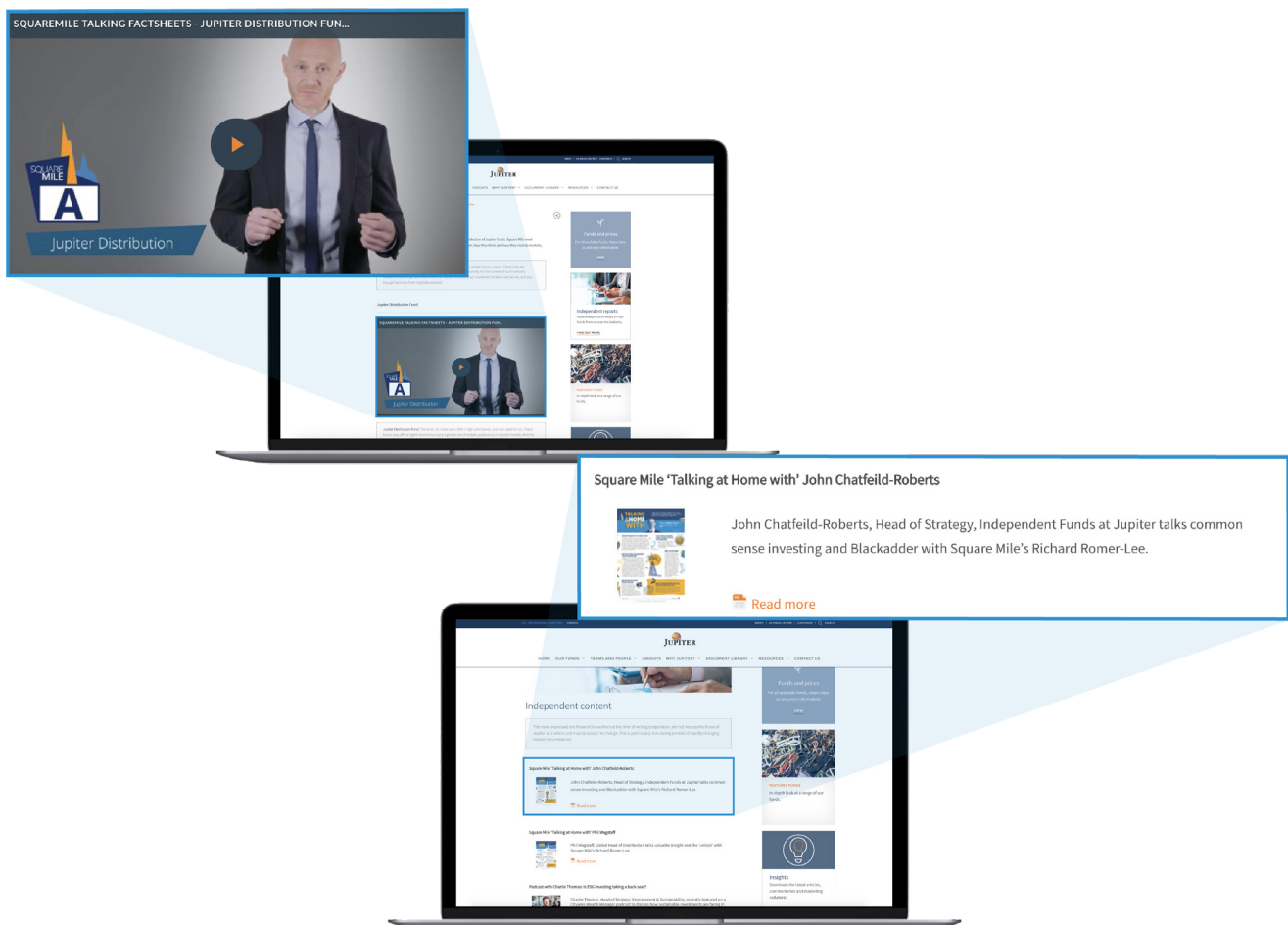
FIND OUT MORE

Everything about duration

Duration is driven by the nature and rate of a bond's coupon, its time until maturity and its yield characteristics.

FIND OUT MORE

3. A dedicated Square Mile webpage including Talking Factsheet videos and Talking With interviews



4. Providing fund and asset class views as part of a broader campaign.

UK EQUITY INCOME

THE FUND VIEW FROM SQUARE MILE INVESTMENT CONSULTING AND RESEARCH

Chris Murphy operates under the philosophy that many investors are habitually driven by fear and greed and therefore tend to overpay for what they perceive to be exciting growth opportunities. He believes that a more mundane approach to investment is appropriate and that steady, simple businesses that have the ability to compound returns over time are the types of companies that investors should seek.

The fund benefits from the lengthy experience of Mr Murphy alongside the challenge and views of James Balfour, who has made a very promising start to his investment career. The pair seem to enjoy a collaborative working relationship and despite favouring what could be described as dull companies, have the courage to match their conviction. Therefore, at times, they will construct a portfolio which, at a sector level, can look markedly different from the UK market.

"We think this is a solid offering within the UK equity income space and one that benefits from a well defined investment process and a complementary pair of fund managers, blending youth with experience"

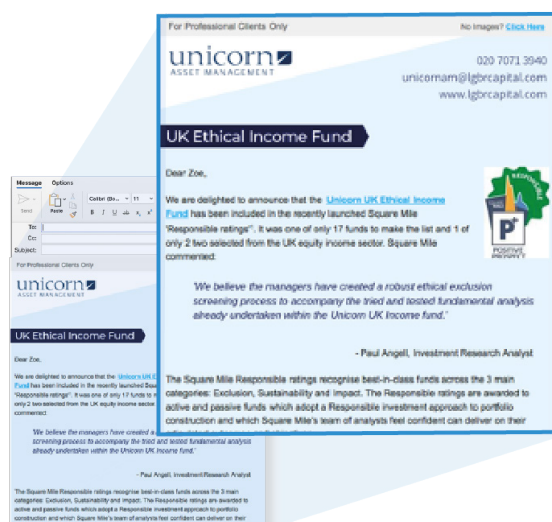
JOHN MONAGHAN, HEAD OF RESEARCH, SQUARE MILE

PREV

Email promotion

The Square Mile ratings are now widely recognised amongst advisers, so asset managers have used this as an opportunity to let their clients and wider distribution list know their fund has received a Square Mile rating.

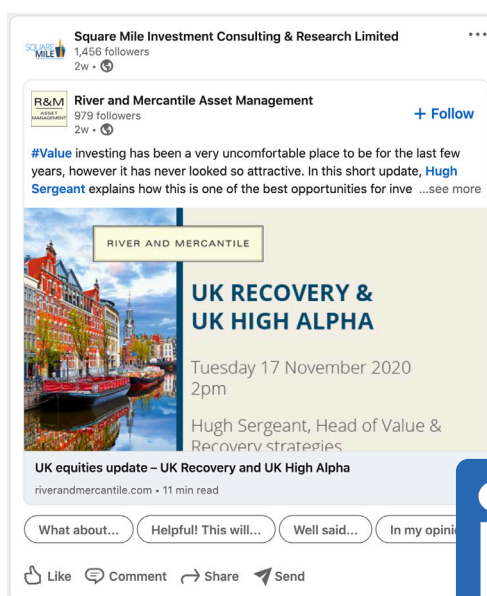
Below is an example of a bespoke email communication to highlight a new rating. We can also work with you to provide a quote from one of the Square Mile research analysts to feature in these communications.



Social media

There is opportunity to work together to promote content via LinkedIn and Twitter. We have worked with asset managers to share their content through our network, as well as giving them an opportunity to post about new Square Mile ratings through their social media channels.

1. Promoting rated fund content through LinkedIn to enhance distribution to a wider network.



2. Participation in external events, promoted via social media channels.



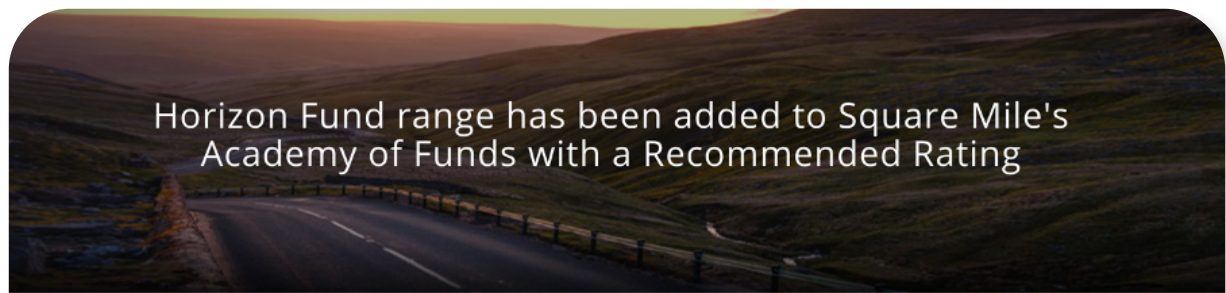
PR support

Square Mile work regularly with trade press and national press to provide fund picks, commentary, articles and quotes. We are also happy to support asset managers in providing independent commentary across various press publications, as well as supporting launch announcements when new funds get rated.


1. Supporting placed articles in trade magazine through independent commentary.




- 2. Press release to announce new Square Mile rating.





Horizon Fund range has been added to Square Mile's Academy of Funds with a Recommended Rating



By **Fraser Blain, Horizon by Embark**
General news
Oct 13, 2020







We are pleased to announce that the Horizon Multi-Asset fund range have been introduced into Square Mile's Academy of Funds with a Recommended rating.

These are just some of the ways that we have worked with asset managers to help support their marketing campaigns. We'd be delighted to discuss how we may be able to work with and support you.

Contact Us

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