



HARNESSING THE POWER OF OUR NETWORK

We offer several routes into the Private Equity asset class, to suit the circumstances and preferences of clients. For clients who prefer a well-diversified strategy, we offer a concentrated portfolio of high performing funds with a focus and time horizon to suit your investment profile.

We also offer direct funds investing in high growth UK companies, managed by our long established and experienced UK private equity team. And for those seeking direct exposure to private investments, we source opportunities through our own network, which are structured by our advisory team to match the client's requirements.

PORTFOLIOS OF PRIVATE EQUITY FUNDS

The Private Investment Funds team focuses on helping you build concentrated portfolios of best-in-class private equity funds globally. The service is complementary to our direct private equity fund since its principal focus is on international managers, whereas the direct private equity fund is focused on UK-headquartered companies.

The team's strategy is to identify the most attractive and highest-returning market segments within the asset class, and to access and select the top-performing managers within each niche. We aim to provide you with returns that will achieve a meaningful premium to listed equity markets. Importantly, our services provide a high level of transparency plus state-of-the-art reporting.

UK DIRECT PRIVATE EQUITY – INVESTING IN DYNAMIC BUSINESSES

We invest equity of between £3m - £15m in profitable UK headquartered businesses with strong, professional management teams and with a turnover of £5m - £50m. We focus our investment activity in core sectors where the UK shows global leadership such as TMT, Financial Services, Energy Services and Business Services.

All clients invest through collective funds, and through those funds investors may, on occasion, be offered co-investment opportunities in addition to their fund holdings.

DIRECT INVESTMENTS ADVISORY

Our corporate finance and direct investments team advises clients seeking direct access to private investments and a more focused exposure to the asset class. This service can provide our clients with ongoing access to high-quality opportunities matching their individual investment criteria and risk profile.

Our team has originated, structured and advised on investments in a range of sectors including financial services, media and technology, consumer products, business services and natural resources.

Many of our clients have extensive commercial and business interests and often view their private investing activity as a natural extension of this.

MAKING THE COMPLEX SIMPLE

However you wish to work with us, you will always have a principal point of contact. This makes your relationship with us simple and straightforward, and ensures that the management of individual aspects of your family's finances is always considered in the context of your broader arrangements.

To find out more, simply contact your Stonehage Fleming adviser
email: enquiries@stonehagefleming.com or visit: stonehagefleming.com

