

Strategic Client Solutions

Working with clients to provide bespoke
portfolio solutions

“Often, clients need more than just pure asset management. Many want an experienced investment partner to help them address core business and investment challenges such as an increased regulatory burden, cost pressures or the need to keep up with new investment opportunities.

Through our strategic client solutions team, we offer wide-ranging support to help make each client’s life easier.”

Our strategic client solutions

By offering a dedicated strategic solutions team, we can work closely with clients to address a wide range of critical challenges which they may face, and aim to help them achieve their investment objectives. In every case, we can harness the full expertise of Aberdeen Standard Investments to determine what action to take and deliver robust, effective solutions.

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Why strategic client solutions?

Finding opportunity in every challenge

Clients face an increasing array of pressures.
But the investment world is offering more ways
to find answers to them.

Our clients come from a variety of perspectives, including pensions, insurance companies, and sovereign wealth funds and yet they are all facing a similar range of challenges, including:

- increased governance requirements
- subdued forward-looking return expectations
- downward pressure on margins and emphasis on reducing costs
- enhanced regulatory framework
- investment products that don't reflect their underlying business mix
- navigating asset-liability frameworks.

As a result, they are looking for more support – whether it is insight on a specific issue, ongoing advice or fiduciary management.

However, in the fast-evolving world of investing there are also a growing number of opportunities, which can help clients meet their challenges, including:

- new and evolving investment approaches
- a growing array of available asset classes
- alternative investments becoming mainstream
- technological improvement and innovation
- portfolio construction and risk management techniques built from factor-based insights.

As one of the world's largest asset managers, we can help clients make the most of these opportunities, in turn, helping address the challenges they face.

“Through broad-reaching, top-down conversations with our clients, we look holistically at their long-term investment needs.”

Ian McDonald
Global Head of Strategic Client Solutions



Why Aberdeen Standard Investments?

A dependable global partner in a complex world

By engaging with our clients to discuss their challenges and desired outcomes, our strategic client solutions team is an important partner for investors worldwide.

Going beyond investment products

Historically, asset management firms have used their resources primarily to manufacture and distribute investment products, such as pooled funds. The relationship with clients was largely transactional, based around the specific capability that the client had purchased. The 'value-add' of an asset manager was to outperform the market benchmark they were set.

Bespoke solutions to client challenges

Many clients continue to come to us for pooled funds or equivalent segregated solutions. However, with the investment landscape becoming more complex, many others are looking for additional support.

Our strategic client solutions team combines investment experience, industry knowledge and access to the global resources of Aberdeen Standard Investments to help create bespoke solutions to specific client challenges.

The team works with all types of clients across the world, helping address issues such as how to respond to regulatory change, how to reflect changing investment approaches and opportunity sets and construct cross-asset-class investment solutions.

Using our global resources

As a diversified global asset manager, we offer substantial resources, expertise and capabilities.

These include:




- research across all asset classes and investment styles
- macro-economic insight and forecasting
- portfolio construction and risk management
- third-party fund research and selection
- product development, innovation and vehicle structuring
- deal flow and origination in private markets
- ESG, stewardship and impact investing.

Chosen by investors worldwide

By harnessing this breadth of capability and by taking a highly bespoke approach for every client, the strategic client solutions team is proud to be a trusted partner to pension funds, insurers, wealth managers and sovereign wealth funds in Europe, the U.S., Asia, Africa and the Middle East.

What our clients ask for

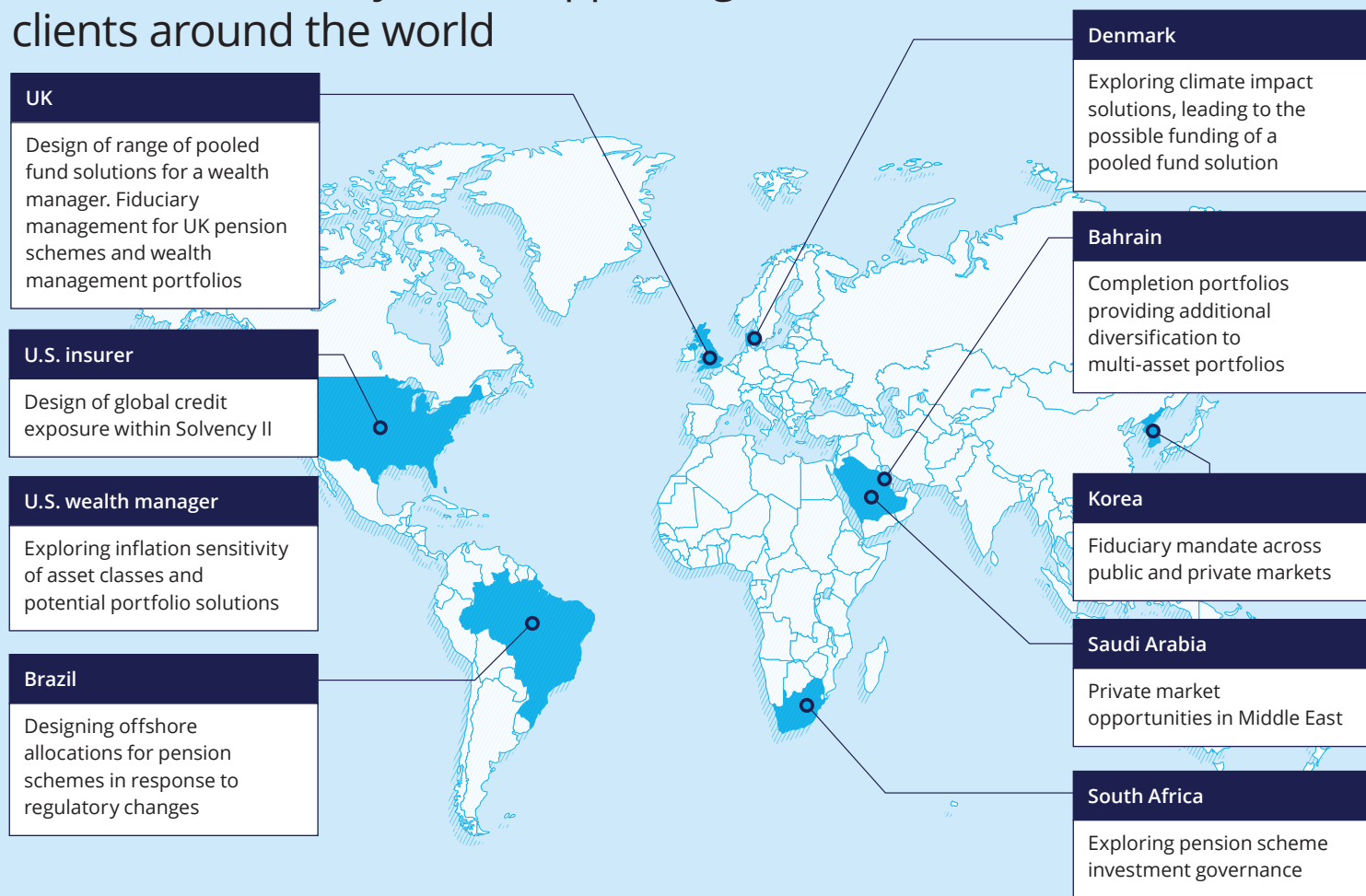
- broader levels of support from trusted partners
- fewer but deeper relationships
- investment strategies focused on specific outcomes and goals
- innovative investment products and opportunities
- sourcing of deal-flow in private markets.

| Our response | | | | |
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| A 'one-stop' service that supports clients across all aspects of their business | We deliver solutions in a governance-friendly format that works best for the client | We provide access to the full breadth of ASI's specialist investment teams | We have the flexibility to work with strategic clients across all key market segments, acting as an adviser, extension of an in-house investment team, partner or product provider | We establish close, long-term relationships with clients, providing ongoing help and support |

Client projects

Mapping solutions

How we've recently been supporting clients around the world



We can support clients in the way that best suits their own resources, regulatory needs and governance structure.

Supporting a broader relationship

Even clients who only want to access a single asset class or pooled fund solution often have broader questions they need help with. We work closely with our client relationship teams to help provide the insight and support vital to broader client relationships. This assists our existing and prospective clients in navigating the range of pooled fund options available.

Structuring of mandates

Mandate design can be as critical to investment success as the ongoing management of a portfolio. This is particularly important where clients are constrained by regulatory issues. We can help clients in benchmark design, structuring and implementation for both cross-asset-class and single asset-class solutions.

Ongoing advisory mandates

From broad-based strategic partnerships to specific advisory mandates, we can engage with clients in a way that best suits their own governance structure. Our advisory mandates primarily focus on cross-asset portfolio design (including strategic asset allocation and portfolio construction), macro and market insights and open architecture manager selection.

Fiduciary management

Many of our clients are not full-time investors. In order to allow them to remain focused on the most important decisions (e.g. setting overall investment objectives and broad investment strategy), the option of delegating asset management to us can provide a valuable governance solution. Fiduciary mandates often give our clients access to a broader array of asset classes, more responsive asset allocation and flexibility to evolve the strategy as circumstances change.

"We support clients across all aspects of their business, working as a partner or an extension of the in-house team. All solutions can be delivered in a governance-friendly format."

Andrew McCaffery
Global Head of Strategic Client Investments



The investment journey

Supporting clients at every stage

Our strategic client solutions team performs a variety of roles when supporting clients through their investment journey.

Client understanding

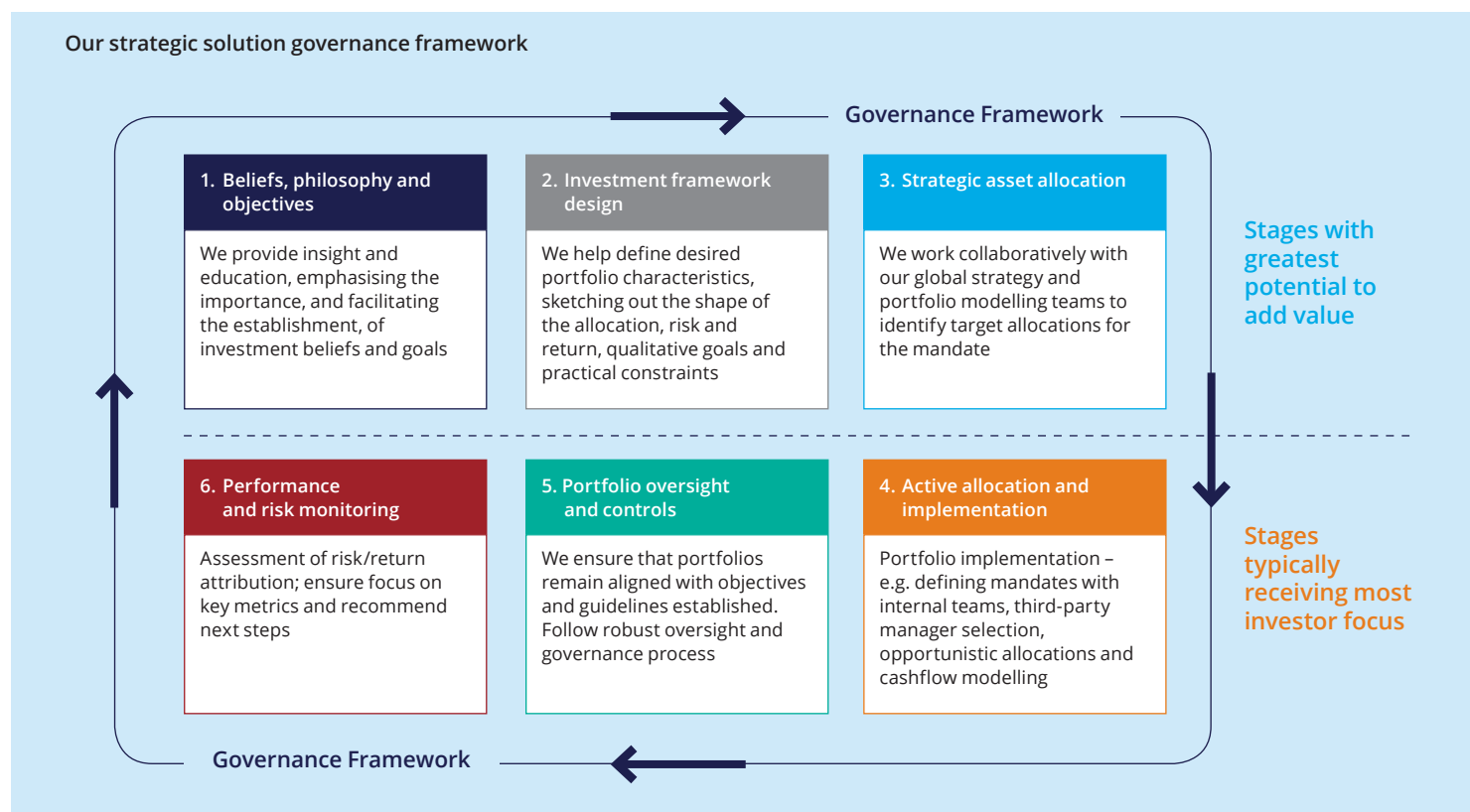
Our experienced portfolio managers have a range of backgrounds – from insurance and banking, to pensions and consultancy.

Our empathy with the challenges and pressures clients face enables us to develop and deliver solutions in the context of each client's unique circumstances.

Disciplined governance approach

Through our disciplined and comprehensive governance framework we can help clients determine where they most need our support.

In turn, we help ensure that time and resources are focused on those higher-impact activities with the greatest potential to add value to our clients.



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