

## Psigma discretionary solutions achieve Defaqto 5 Star Ratings for a fifth consecutive year

‘one of only 10 DFMs to have 5 Stars in 3 categories’

**1<sup>st</sup> February 2017:** Only seven discretionary management firms, with propositions in both the DFM Bespoke and DFM MPS Direct categories, have seen both offerings achieve 5 Star Ratings for 5 consecutive years (2013 to 2017 inclusive). Psigma is one of these DFMs.

The Defaqto Star Ratings process independently assesses and analyses the key features and benefits of DFM’s products focusing on their quality to support better decision-making. In receiving the highest level of rating, Psigma continues to demonstrate their commitment to the adviser market through providing transparent investment solutions and a high level, of personal service.

Frank Potaczek, Senior VP for Funds & DFM at Defaqto, commented:

“With the quality and number of product features and benefits now available, it is more difficult than ever to choose the right product for clients. That is why we believe our Star Ratings become even more important, as the ratings help determine the level of cover or feature on a product, ensuring the choice is based on fact, not opinion.

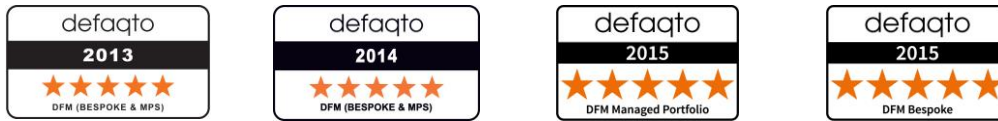
We are pleased that Psigma Investment Management has been given 5 Star Rating for their Bespoke and Managed Portfolio Service discretionary solutions. Our ratings are independent and unbiased so this accolade shows the commitment to quality and comprehensiveness of their proposition.”

Furthermore, the increase in adviser demand to seek out the most suitable way for their clients to access high quality discretionary management over the recent years has driven growth in Psigma’s Platform Portfolio proposition. This too has received a 5 Star Rating in 2017 following distribution expansion through a number of platform partners such as FundsNetwork, Standard Life Wrap, Ascentric, Transact, Aviva, Fusion and 7IM.

**Frank McGarry, Director of Business Development and Marketing said:**

*“I am delighted Psigma has been awarded the highest accolade, 5 Star Ratings from Defaqto for our three multi asset investment solutions. Furthermore to have this awarded over 5 consecutive years for Bespoke and MPS demonstrates the efforts we take to stay ahead of developments and maintain a high quality proposition for our clients and for their advisers. This recognition further supports our growth plans and our commitment to be a leading Discretionary Fund Manager providing a personal and high quality proposition.”*





**Ends**

**For further information, please contact:**

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**Notes for Editors:**

### **About Psigma Investment Management**

Psigma Investment Management was established in 2002 by a team of highly experienced investment managers. The business has expanded rapidly and has been extremely successful in attracting assets under management of £2.61 billion (as at 31 December 2016) from Private Clients, Charities and Pension Schemes. Much of this success is due to Psigma Investment Management being uniquely positioned to utilise the skills of the consulting businesses within the Punter Southall Group, to help it design specific solutions for its respected clients rather than shoe-horning them into inflexible standard products.

Drawing on the shared intellectual capital and expertise of the different businesses within the Punter Southall Group umbrella, the group provides innovative, integrated, liability-led, client-focused investment and financial planning solutions.

### **About Defaqto Star Ratings**

Defaqto is a financial information business, helping financial institutions and consumers make better informed decisions.

Our independent fund and product information helps banks, insurers and fund managers with designing and promoting their propositions. We analyse around 41,000 financial products in the UK, of which just over 10,000 are Star rated.

The company's expertise has been developed as a result of more than 22 years of experience in financial data collection and analysis.

Our experts impartially identify the key attributes that make up a financial product and rate them on a scale of 1 to 5.

Our independent, unbiased experts have done all the hard work so that financial institutions and consumers can make better informed decisions.

The DFM Star Ratings assess discretionary fund managers across a wide range of aspects to provide an independent verification of the depth and flexibility of what each proposition offers. To achieve the highest level of rating, as Psigma's propositions have done, providers need to demonstrate a commitment to the adviser market and produce service terms with a strong degree of flexibility, transparency and a high level of personal and online service.

Psigma Investment Management is a trading name of Psigma Investment Management Limited. Authorised and regulated by the Financial Conduct Authority. Registered in England and Wales No. 5374633. FCA Registration No. 478840.

**Registered office: 11 Strand, London WC2N 5HR**

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