

NEWTON

Investment
Management

January 2025

➤ **BNY** | INVESTMENTS



Defined contribution

Why work with Newton?

STRICTLY FOR UK PROFESSIONAL INVESTORS ONLY.
Please read the important disclosure at the end of this document.

Unlock opportunity

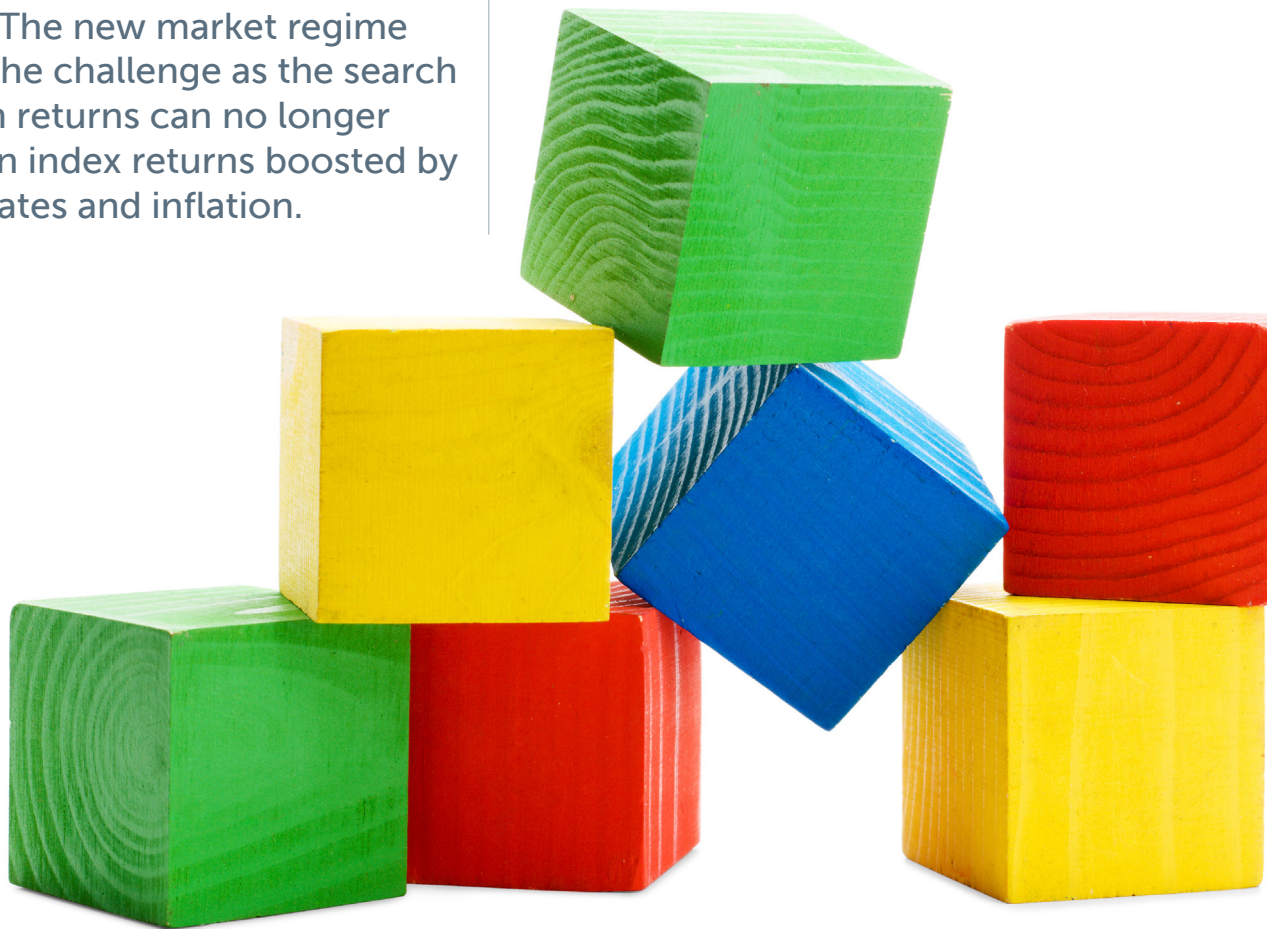
Working in partnership with DC pension schemes to help unlock better member outcomes.

With over 40 years of investment experience, more than 120 investment professionals and £81.3bn of assets under management (as at 31 December 2024), we work closely with DC master trusts, DC schemes and specialist DC consultants to ensure we fully understand the outcomes that members are looking for and any constraints or specific considerations that schemes must take into account.



Challenges and opportunities

The challenges faced by DC pension schemes are diverse, and an increasing focus on sustainability, value for money, access to private markets and decumulation-readiness are driving schemes to reconsider their investments. The new market regime compounds the challenge as the search for long-term returns can no longer rely heavily on index returns boosted by low interest rates and inflation.



We believe that this backdrop presents the ideal opportunity to consider active and adaptable investment strategies that can be aligned to your needs.

Why Newton?

Our capabilities are aligned with clients' requirements

✓	Newton best ideas	Accessing Newton's best stock pickers, asset allocators and risk managers
✓	Dynamic and global	Researching the best opportunities around the world, regardless of geography or sector
✓	Direct investment	Flexibility, value for money and transparency
✓	Active management	Capturing opportunities in a more volatile and divergent market environment
✓	Multidimensional research	Our multidimensional approach allows investment team members to exploit an unusually wide and innovative range of inputs in their idea generation

By being an expert partner to DC schemes, we help them **unlock opportunity**.

- Over a decade of experience in developing and managing target-date investment strategies
- Advanced research in retirement income investing to target more durable decumulation solutions
- Adaptable systematic and discretionary active management that can be tailored to specific requirements and objectives
- Sustainable risk-targeted range of investment strategies: our FutureLegacy funds are designed to help advisors align investments to clients' risk capacity

Our DC strategies

We offer a range of solutions and capabilities that are aligned with DC investors' priorities, and we are committed to understanding and analysing the requirements of our clients.

While all our investment strategies can be included in a DC scheme, we highlight a selection of established strategies which are designed to work as components across DC solutions.

Best of Newton	Bespoke portfolio design, calibrated to outcome target, risk tolerance and other criteria, using established capabilities and processes
✓ Target-date & target-risk strategies	Deep experience in mixed assets and conventional components aligned with the requirements of DC clients and their advisors
✓ Multi-Asset Income	Managers focused on the reliability of being paid to hold risk
✓ Global Equity Income	Inherent quality and value biases that align with the retirement income mindset
✓ Dynamic Factor Premia	Cost-effective diversification – accessible liquid systematic alternative alpha
✓ Adaptive risk overlay	Mitigating sequencing risk in a more volatile and divergent market environment

Our strategies align with the core requirements of DC investors

Growth	Multi-Asset Growth Dynamic US Equity
Diversification	Dynamic Factor Premia Real Return Sustainable Real Return Multi-Asset Diversified Return
Preservation	Global Dynamic Bond Sustainable Global Dynamic Bond
Income	Global Equity Income Multi-Asset Income Dynamic Factor Premia

Bespoke solutions

We offer bespoke investment solutions which encompass flexible asset allocation, sophisticated risk management and a multidimensional research approach.

Simple, dynamic and differentiated retirement solutions design

Want to find out more?

Institutional investors

E: institutional@newtonim.com



Your capital may be at risk. The value of investments and the income from them can fall as well as rise and investors may not get back the original amount invested.

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Newton Investment Management

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