

Investment Services

The increasing uncertainty of investment markets, plus heightened regulatory control, means that investment governance features prominently within pension scheme agendas, for trustees and sponsors alike.

Quantum's investment consulting team has the range of services to meet all governance needs and budgets. Our experience suggests that one of the following three choices will satisfy the vast majority of Trustee Boards and Pension Committees.



Investment Consulting

An enhanced approach to traditional investment consulting, delivering clear guidance using leading edge modelling and research ideas, via a personal, “engaged partner” approach.

Fiduciary Consulting

Our premium service for trustees who are intent on managing assets and liabilities proactively on a continuous basis, using all our available consulting solutions.

Fiduciary Manager Governance

An independent and informed approach to third-party fiduciary manager procurement, plus ongoing monitoring and management of the value that such managers add.

Fees for all of the above are structured on a “no surprise” basis, with the cost of project work spread over a three year period, if required. Summary details can be found overleaf. More detailed factsheets are available on request.

Our contact details

Should you wish to discuss these services then we would be very pleased to meet you.

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About Quantum Advisory

Established in 2000, Quantum Advisory is an independent actuarial and investment consultancy, dedicated to providing specialist services to pension funds. Our tailored and straightforward advice to sponsors and trustees delivers practical solutions to specific challenges and issues.

Strategy

Through a combination of econometric models, scenario stress tests and common sense, we devise, analyse and manage strategies for clients. Factors such as long and short term return potential, value-at-risk, liquidity and cost are all taken into consideration. Our dynamic LDI (liability driven investment) approach incorporates client-specific triggers for steering return-seeking and liability-matching allocations.

Implementation

We use internal and external resources to uncover, monitor and blend the best fund managers from around the globe. Using fundamental, qualitative research plus in depth quantitative analysis, we maintain a stable of favoured managers for all main asset classes. The use of a market leading, third-party implementation solution gives clients access to economies of scale and efficient transition management.

Reporting

In line with recognised best practice, all funds and managers recommended by Quantum are continuously monitored from both an investment and operational perspective. Our independent reporting service helps clients gauge the service they receive and ensures that managers remain suitable. It allows the opportunity to question under-performance, highlighting longer-term achievements plus any structural changes at the management house.

Governance

In a complex and challenging world, the ability to exercise and demonstrate good governance is crucial. We actively assist Trustees and sponsors to ensure that investment arrangements remain both compliant and fit for purpose. There are three governance models to choose from.

