

Novia Global adds City Financial to DFM panel

7th March 2017 - Novia Global today announces the addition of City Financial to its panel of nine Discretionary Fund Managers. City Financial will offer a range of three risk-rated model portfolios to international IFAs. The three portfolios are managed by City Financial's Multi-Asset team, led by award-winning veteran Mark Harris. They are managed within pre-determined risk limits, independently verified by Distribution Technology, an industry-leading risk profiling company.

City Financial outlines the key characteristics of the portfolios are:

- > Three models for different levels of risk appetite – City Financial Cautious Model, City Financial Moderate Model and City Financial Adventurous Model.
- > Risk validated by an independent, industry-leading risk profiling company.
- > Low investment management fee.
- > Based on our Award-winning Multi-Asset investment process.
- > Differentiated fund selection provides access to specialist managers and aims to enhance risk-return.

The portfolios will be marketed by Global Wealth Management Solutions (GWMS), who already distribute the City Financial Wealth Fund to international investors. GWMS specialise in providing access to leading financial products for global intermediaries.

Dave Field, Head of Customer Service at Novia Global, said:

"We are thrilled to have extended the breadth of our DFM offering with the addition of independent asset manager City Financial to the Novia Global platform. City Financial's reputation for agility and investment excellence makes them an ideal addition and we are delighted to partner with a firm so committed to writing business in the international markets. This new addition takes the total number of DFMs available on Novia Global to nine."

Mark Harris, Head of Multi-Asset at City Financial, says: "Partnering with Novia Global is an exciting development, allowing us to offer a complete investment solution for international intermediaries. Risk management is already at the heart of our investment process, and it is logical for us to offer risk-targeted model portfolios alongside our existing multi-asset fund range.



We believe we can deliver attractive returns through our established approach to tactical asset allocation, and differentiated fund selection.”

Kevin Bull, Director of Asset Management Clients at Distribution Technology, says: “Distribution Technology is pleased to be working with City Financial and their risk-targeted portfolios. This is an area of growing interest to IFAs both in the UK and internationally.”

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Notes to editors

Novia Global Limited launched in 2015 to provide a comprehensive wealth management service or ‘full wrap platform’ for investment advisers and their clients in the international market. Novia Global provides a transparent pricing structure as well as access to a wide range of investment products each with their own Cash Facility, an extensive suite of portfolio management tools, and access to an extensive range of investment classes including shares, bonds, traditional authorised funds, ETFs and alternative investments.

The core operating system is provided by Australian based GBST who have been developing software solutions for fund administration and financial services since 1996, and for wrap solutions since 1999, amassing \$186bn (AU) in assets under management on their systems. The comprehensive suite of portfolio management tools is powered by Financial Express.

The Novia team, based in Bath, is led by Bill Vasiliieff ex Sales and Marketing director and joint cofounder of Selestia. Novia as an independent proposition has substantial financial backing from a combination of private individuals and corporate organisations. The board is chaired by John Beaumont, who has held a number of non-executive roles in major public organisations and several technology start-ups and Donald MacKinnon as non-executive, ex sales director of Matrix Securities.