

Company Profile

Psigma was established 19 years ago as we believed that large banks struggled to hold their clients' best interests above those of the firm. We had then, and still do have, a very strong belief that inflation is the greatest threat to long-term investors.

Our focus is to grow the real value of your assets over the long term; we do this in the context of aiming to protect wealth in extreme market conditions, especially during market downturns. We have a consistent track record of delivering inflation plus returns and we achieve this through multi-asset allocation, diversification and not through the extensive use of derivatives or hedging.

Taking an outcome-oriented approach, we focus on our clients' investment goals to achieve and agree on the "best fit" investment portfolio. We build risk-appropriate portfolios using a broad mix of asset classes to suit their needs. This approach works well with the financial plans that clients and their advisers create.

This proposition has helped Psigma grow at a rate that attracts and retains talented people but without compromising the high levels of personal service we aim to provide to our clients. Punter Southall Wealth Ltd, of which Psigma is a division, manages over £3.9bn of client and corporate assets. Psigma directly manages assets for private clients introduced by independent professional advisers. They are supported by both systems and assistants which allow them to do their job, principally, managing client assets and providing quality client service.

Why did you want to sponsor the report?

At Psigma our focus is on generating positive client outcomes, and working with ESG Accord helps to add value to our DFM proposition ensuring that our IFA partners can improve their ability to assess their clients ESG and Sustainable practices within their suitability process. Advancing education and training on this subject is very important and was a driving factor to why we sponsored this report.

What are you actively doing in the ESG & Sustainable space?

We are very active in discussing our proposition with our IFA partners and providing seminars and workshops to their employees on the subject.