

ebi Portfolios announces launch of Fund of Funds range

ebi Portfolios has announced the launch of its new Fund of Funds range, adding to its product lineup alongside its popular model portfolio suites.

The range is made up of two funds targeting different risk levels, Global Factor 60 and Global Factor 80. These are unitised versions of ebi's flagship Earth 60 and 80 portfolios, and bring a unique offering to the fund of funds market, through their ESG-screened and factor-tilted approach.

The funds have been developed in response to client demand in the face of falling capital gains tax allowances, and the issues faced by investors unable to access ebi's portfolios through tax-efficient wrappers. The fund of funds structure enables such investors, including those investing through General Investment Accounts (GIAs), to gain exposure to ebi's factor-based investment philosophy while benefitting from a structure designed for tax efficiency. Whereas fund swaps and rebalances in model portfolio solutions create an immediate capital gains tax event, the fund of funds structure enables these changes to occur without triggering such an event at that point in time.

These new funds will benefit from the recent enhancements made to the Earth range, incorporating four factor funds developed by ebi in partnership with European asset management giant Amundi. **These funds reflect ebi's belief in the power of market factors to deliver premiums above market returns over time.**

ebi's Head of Investment Jonathan Griffiths said: "We've launched the Global Factor funds in response to client demand for a tax-efficient fund of funds solution, managing using our award-winning factor-tilted and sustainability-focused approach. When taken alongside our AUM recently surpassing £5bn, this new product range comes at an exciting period of growth for ebi".

This launch comes following a busy period for ebi, with its growth to £5bn AUM coming off the back of continued growth in assets for its flagship Earth range, and its market-tracking Core range. It has also received multiple awards in recent months, including the Investment Week Sustainable Investment Awards' prize for Best Sustainable/ESG Investment Portfolio for its flagship Earth suite, and the Money Marketing Awards' Best Outsourced Investment Manager for the second year running.

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Notes to Editors

Model portfolio service (MPS) provider ebi's sustained growth since its founding in 2010, to £5bn AUM today, is driven by an innovative investment proposition in conjunction with an award-winning technology suite.

ebi offers a range of low-cost and globally diversified model portfolio solutions, centred around its flagship Earth portfolio suite, which adopts a factor-tilted and sustainability-focused approach.

ebi strives to be at the forefront of sustainable investing. Having observed a lack of low-cost, diversified, and rules-based ESG investment solutions in the marketplace, ebi has collaborated with leading investment managers to introduce cutting-edge sustainable investment solutions that are fair, robust, and transparent for end-clients.

Launched by an IFA, ebi understands the requirements of advisers in supporting their clients. Its award-winning technology helps facilitate client conversations, mitigate risk and supports advisers and their businesses.

ebi is part of the same group as Parmenion Capital Partners LLP and shares common ownership. ebi continue to operate with an independent management team and its own offices, alongside the support and resources of Parmenion to help it achieve its ambitious growth plans.

To learn more, visit ebi.co.uk.