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# abrdn – Multi-asset investment solutions

September 2021

## Your global multi-asset partner

# 30

30 years of multi-asset investing

\*As at 30 June 2021

# 100+

100+ dedicated multi-asset professionals

# \$247

\$247 billion managed in multi-asset strategies

## Bringing together a broad range of asset classes to achieve your investment outcome

Investors have an unprecedented range of asset classes to explore to help them reach their investment goals. For 30 years at abrdn, we've been bringing together our expertise across public, private, core and specialist asset classes to build multi-asset strategies.

By investing in a broad range of asset classes and investment strategies, we can manage your portfolio risk in an effort to generate returns and income that are aligned with your objectives over a market cycle. Whatever the outlook for mainstream equities and fixed income, our multi-asset approach will help you achieve your specific investment goals. An assessment of environmental, social and governance (ESG) factors is integrated into every stage of the investment process. We also manage specialist sustainable strategies, such as climate solutions.

Our investment culture is client-centred with a people ethos. Our focus is on delivering excellence with high integrity via continuous improvement.

## Why abrdn for multi-asset

We draw on the full investment capabilities of abrdn to deliver multi-asset strategies to expand your sources of return and look to deliver smoother, long-term investment performance.



### Broaden your potential

We have the scale and expertise to combine a range of specialist and mainstream asset classes. This expands the sources of potential return. Together with a forward-looking assessment of risk, this is designed to give you smoother, long-term investment performance.



### Target your outcome

Many of our multi-asset strategies are designed to target specific goals and risk-reward requirements – from tactical asset allocation to diversified income/ growth to absolute return 'cash-plus' strategies. These can be further customised to meet your needs.



### Focus on sustainability

Our multi-asset strategies can help contribute to the long-term health of society and our planet. We assess ESG factors when we invest. We can incorporate climate scenarios into our forecasts for asset class returns. We also manage specialist sustainable strategies.





“Our integrated research platform and advanced risk management enable us to generate high-quality ideas and to deliver specific outcomes for our clients. This is underpinned by an inclusive investment culture that is focused on continuous improvement.”

**Aymeric Forest**  
 CIO Multi-Asset Investment Solutions  
 abrdn

## Multiple approaches to match your needs

To meet a range of investor goals and preferences, we support six multi-asset approaches, each with its own team and process. These are all supported by the global resources of abrdn.

1. Preservation	2. Growth	3. Income	4. Sustainable	5. Balanced	6. Multi-manager
<p>Has the flexibility to use a full array of investment techniques and liquid instruments. It includes taking both 'short' and 'long' positions to target positive returns, irrespective of whether the market is rising or falling.</p> <ul style="list-style-type: none"> <li>• Extensive investment flexibility.</li> <li>• Focus on long-term market view (up to three years) to fully exploit non-consensual ideas and mispricing.</li> <li>• State-of-the-art risk control, including historic and forward-looking stress testing.</li> <li>• Full-market coverage for efficient implementation and execution.</li> </ul>	<p>Blended asset classes with very different sources of return. This approach aims to deliver strong long-term returns with lower volatility than equities.</p> <ul style="list-style-type: none"> <li>• Driven by our strategic views on long-term macro-economic drivers and asset class return prospects.</li> <li>• Actively allocate to whichever asset classes are most attractively priced.</li> <li>• As well as equities, asset classes include:           <ul style="list-style-type: none"> <li>High yield and emerging market debt</li> <li>Real assets</li> <li>Listed private markets</li> <li>Special opportunities.</li> </ul> </li> </ul>	<p>Combines multiple asset classes in an effort to generate a high level of income and some capital growth.</p> <ul style="list-style-type: none"> <li>• Our diversified approach accesses traditional and non-traditional asset classes designed to generate natural income.</li> <li>• Our dynamic approach uses a more flexible process and seeks to generate natural income via core assets and boosts this by call overwriting.</li> </ul>	<p>Focuses on sustainable or responsible outcomes, leveraging the ESG capabilities within abrdn and the multi-asset team.</p> <ul style="list-style-type: none"> <li>• Climate solution funds invest in companies focused on wind and solar power, electric vehicles, battery technologies, energy efficiency, and related low-carbon solutions. They invest via equities, green bonds, sustainable infrastructure and green real estate investment trusts (REITs).</li> <li>• Responsible absolute return funds invest using a combination of integration, thematic investments, exclusions and positive tilts.</li> </ul>	<p>Uses a combination of strategic and tactical asset allocation in an effort to generate returns and manage risk.</p> <ul style="list-style-type: none"> <li>• Strategic asset allocation is based on our proprietary long-term asset class forecast.</li> <li>• Tailored implementation of our 3 to 12-month tactical market views.</li> <li>• Allocation to uncorrelated absolute return ideas.</li> <li>• Uses a range of implementation options, including direct securities, internal and external pooled funds, exchange traded funds (ETFs), and derivatives instruments.</li> </ul>	<p>Focuses on fund-based solutions that blend managers to create portfolios aligned with clients' risk, return and cost needs.</p> <ul style="list-style-type: none"> <li>• Portfolio construction is supported by a dedicated team of experts in manager assessment and selection. This provides a menu of high-quality fund styles and strategies across asset classes.</li> <li>• Full array of outcomes from low cost, passive to high alpha.</li> <li>• Managed to meet clients' risk tolerances.</li> <li>• Flexible implementation including fund-of-fund, managed portfolio service and segregated.</li> </ul>

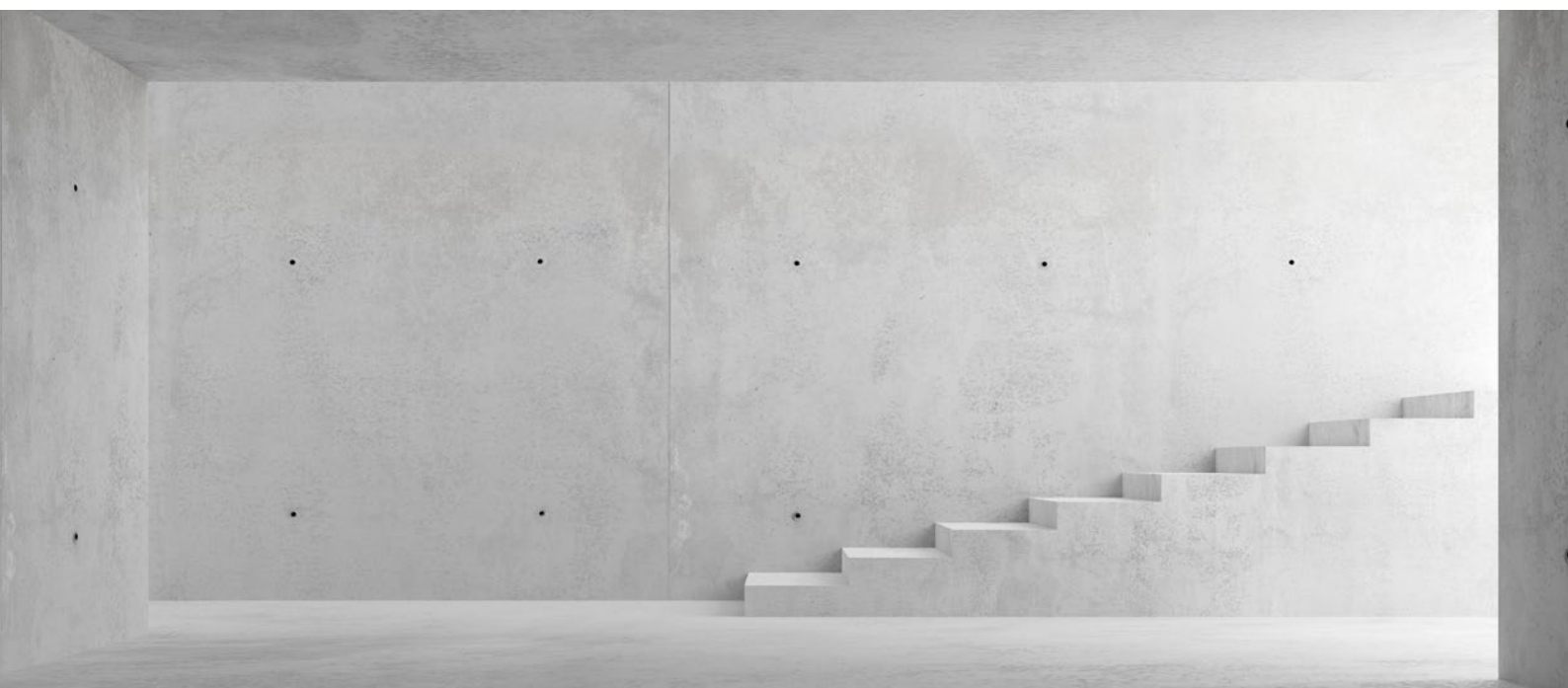


1. Preservation	2. Growth	3. Income	4. Sustainable	5. Balanced	6. Multi-manager
<b>Available strategies</b>	<b>Available strategies</b>	<b>Available strategies</b>	<b>Available strategies</b>	<b>Available strategies</b>	<b>Available strategies</b>
<ul style="list-style-type: none"> <li>• Absolute return</li> </ul> Targets returns from cash +3% to cash +7.5% and risk levels from 2% to 12%	<ul style="list-style-type: none"> <li>• Diversified growth</li> </ul> Targets returns of cash +5% and half the risk of equities <ul style="list-style-type: none"> <li>• Listed private capital</li> </ul> Targets return of 10-12% per annum	<ul style="list-style-type: none"> <li>• Diversified income</li> </ul> Targets a yield of 4.5% <ul style="list-style-type: none"> <li>• Dynamic income</li> </ul> Targets a yield of 5.5%	<ul style="list-style-type: none"> <li>• Climate solutions aim to outperform comparator</li> <li>• Responsible absolute return strategy targets cash +5% with volatility of 4-8%</li> </ul>	<ul style="list-style-type: none"> <li>• A range of funds and solutions tailored to clients' risk and return objectives</li> </ul>	Multiple risk-targeted fund ranges: <ul style="list-style-type: none"> <li>• Growth: index-based and high alpha</li> <li>• Income strategies</li> <li>• Sustainable strategies</li> </ul>



**"Having a dedicated team of specialist fund selectors means we have detailed knowledge on a range of managers across asset classes, styles and costs. This enables us to meet all portfolio needs."**

**Katie Trowsdale**  
 Head of Multi-Manager Strategies  
 abrdn



Target returns are offered as strategy goals and are not referenced to past performance. There can be no guarantee the target returns will be achieved.

## Important Information

Investment involves risk. The value of investments, and the income from them, can go down as well as up and an investor may get back less than the amount invested. Past performance is not a guide to future results.

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