



Best Investment Management Boutique - UK & Award for Excellence in Low Cost Tracker Fund Investing 2016



EQ Investors (EQ) is an award-winning boutique wealth manager acting for private clients, small companies and charities all around the UK. Chief Executive John Spiers discusses the firm and the secrets behind its success.

EQ stands for Emotional Quotient, a measure of the firm's ability to recognise people's emotions, as well as reflecting the firm's commitment to treat all people: clients, staff, and suppliers, as human beings and to value their feelings. It is this focus on supporting people that sets the firm apart, as John is eager to emphasise.

"At EQ we have a strong sense of being a member of a wider community, which differentiates us from many other firms in our space. We are proud to be one of the first UK companies to be awarded B Corporation status, for companies that believe in business as a force for good. We operate a Matched Giving programme to help our clients and staff raise extra funds for their favourite causes and we have set up the EQ Foundation as a registered charity. Our Positive Impact Portfolios are a unique proposition for clients who care about how and where their money is invested.

"Specifically with regards to investments and funds, our main role is to make our clients' investments work as hard as possible and support that with advice that helps them achieve their objectives. We do that by employing the best staff and supporting them in an environment that celebrates quality over quantity. Our portfolio managers are Chartered Financial Analysts and our firm has Chartered Financial Planning status."

In order to offer investment opportunities to a wide variety of clients, EQ offers a vast range of managed portfolios designed to reflect different investment themes and risk profiles, including Low Cost, which is designed for people who prefer the lower cost of passive funds and the greater certainty of tracking index performance; Positive Impact, which invest in

funds which can show that they are supporting companies taking steps to achieve a social or environmental impact as well as a financial return; Best Ideas a portfolio designed to invest in the very best ideas unearthed by our research team, unconstrained across all asset types; and Absolute Return for clients who are uncomfortable with the sharp swings that occur in stock market values but seek the potential for higher returns than available from investing in cash and government bond.

Following significant investment over the last eighteen months, EQ now offer a service for 90% of the savers and investors out there. Moving forward, the firm are focused on attracting new clients across its range of services and fine tuning its offering in order to better serve its clients in the ever evolving investment market. Ultimately, John believes that the firm's long term focus will be on continuing to provide excellence, rather than achieving as much growth as possible.

"Fundamentally, our ambition at EQ is to be the best, not the biggest. As such we are committed to keeping the business permanently under the control of staff so that we avoid the disruption that occurs with changes in control. The result is that we can think long term and put the interests of clients at the top of our agenda without looking over our shoulder to check that our owner approves. We also have an on-going programme to continually improve our services to clients. An example of this is the new client portal we have recently rolled out. It offers clients a clear view of all their assets in one place, including both those held with EQ and elsewhere, plus a transparent analysis of performance. It seems to be an attractive proposition judging by the number of new clients that we have attracted, and therefore this will continue to be our focus as we look to the future."