



PORTICO

ABOUT US

The Portico Group was co-founded by Jeremy Polturak and Harriet Steel in 2003 to provide marketing strategy and distribution services to independent alternative investment managers.

The co-founders met at Bankers Trust Company in 1990, where they were both key members of its pioneering global derivatives team.

Jeremy Polturak worked at Bankers Trust between 1989 and 1997 where latterly he was Head of Corporate Fixed Income and Currency Derivatives Sales.

Harriet Steel ran Corporate and Institutional Currency Derivatives Sales for the banks French speaking clients until 1996 when she joined as a director of Morgan Stanley's Fixed Income group.

Patrick Folkes joined Portico as a principal in March 2008. In 1990 Patrick founded Folkes Asset Management, an early provider of marketing and distribution to alternative investment managers. In 1998 the business founded Headstart Advisers, a fund of hedge funds which grew to AUM of 1 billion USD. Patrick sold his interest in Headstart (previously Folkes Asset Management) in 2003.

Between them, Portico's three principals have over 70 years experience in financial markets. Their skill sets encompass an in depth understanding of derivative products, the risk management and trading requirements of large multi-asset portfolios and the investment management and marketing of hedge funds.

The Portico Group has offices in Monaco and London staffed by a multilingual team of researchers and marketing professionals.

OUR CLIENTS

Portico currently runs a variety of mandates for investment managers based in Europe, the US and Asia. We cover the entire spectrum of alternative investment products from private equity and real estate through fund of funds to single manager hedge funds. We have raised assets successfully for both established and emerging managers. Portico is highly selective in accepting client mandates. The defining feature of the managers we represent is the quality of their investment and risk management, both subject to thorough quantitative and qualitative due diligence. We aim to maintain a client portfolio with one exemplary manager per strategy type and in this way avoid any conflict of interest for our clients.

OUR APPROACH

Portico takes a systematic and rigorous research based approach to marketing strategy.

Our business is to know the investors, their investment philosophy, strategy interest and risk profile.

Since 2003 we have built a comprehensive database of global alternative investment allocators and tracked their investment parameters and preferences. Our researchers update the database continually.

We differentiate ourselves by avoiding the more typical product led sales strategies. With an investor led approach, we are able to implement strategic and selective distribution to highly targeted groups of product appropriate investors.

This research driven process has proved highly effective in raising assets and defining marketing strategy for our clients and has enabled us to build constructive and lasting relationships with hedge fund managers and allocators alike.

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