

WINNER



Alternatives Investment Provider of the Year - Argenta Private Capital Limited

Alternatives are an essential part of an asset manager's portfolio, and this award gives recognition to those firms showing a true skill for extracting value across the alternatives space for clients in the institutional and retail asset management space. When it came to deciding a winner, the judges were impressed with Argenta Private Capital Limited's (APCL) capability in this field. This was APCL's first ever Wealth and Asset Management Award.

APCL is a Lloyd's members' agent, offering private investors the opportunity to underwrite (invest) in the Lloyd's of London insurance market. APCL's clients, who for 2023 are underwriting in excess of £4.3bn of premium, have benefitted from average annualised returns of more than 10% (while 2023 is forecast to produce returns of 30%* there may be years of losses). Lloyd's investors also benefit from the ability to use assets twice i.e. an existing investment portfolio can also support a Lloyd's underwriting portfolio, which generates returns with low correlation to traditional asset classes. A Lloyd's investment is also efficient from an Inheritance Tax perspective.

In recent years, APCL has witnessed an increasing number of professionals from a variety of back-grounds across its ultra-high-net-worth client base, having been introduced to the opportunity by their respective bankers,

wealth managers and advisors. Alongside these new clients, multiple generations of families remain as APCL clients, exemplifying APCL's ability to forge long term relationships and testament to the quality advice clients receive about their Lloyd's investment.

To tailor the investment opportunity to suit a client's risk appetite, APCL conducts extensive qualitative and quantitative research into the ever-evolving market for its clients and prospects, to ensure that it can build its investment vehicles to suit a range of individual circumstances, whether in a risk, tax or regulatory perspective. APCL explained that they had recently set up new and innovative structures to access the Lloyd's market, and had further sought to provide a best in class service by merging the tax and corporate services business, to provide clients with end-to-end market leading research, analysis and investment advice with specialist tax and accounting services, making investing in Lloyd's much easier for its clients.

We would like to congratulate APCL on winning this award and for such a strong performance in 2023.

**Lloyd's is an investment that works on a three-year accounting basis meaning that the forecast returns will be subject to change. These forecast returns are based on APCL research team forecasts.*

Past performance is not an indication of future returns.

