

Introducing Investor Solutions from BNY Mellon

Video transcript

Hello, my name is Jamie Lewin. I'm pleased to announce the launch of a new investment function at BNY Mellon called BNY Mellon Investor Solutions.

The Investor Solutions team is comprised of approximately 60 investment professionals with expertise across multiple disciplines that include: asset allocation, portfolio construction, risk management, manager research and multi-asset portfolio management. Collectively the team offers both discretionary portfolio management and non-discretionary investment advisory services to a full range of investor types including: corporations, endowments, foundations, family offices, registered investment advisors, sovereigns, and insurers.

Details relating to the full range of services offered by Investor Solutions can be found on our website. However, they are easily summarised in to two related, but distinct, capabilities: Customised Portfolio Solutions and Outsourced Chief Investment Officer (or OCIO) services.

Our Customised Portfolio Solutions menu includes: model portfolios, tailored multi-asset and multi-manager strategies, risk overlay programs, customised alternatives programs and obligations-driven solutions.

Our OCIO service model includes: portfolio design, asset allocation and portfolio construction, manager research, investment analytics, ad-hoc research and trust and custody services.

For many years BNY Mellon has offered these services to its wealth management and investment management clients, supported by various investment teams from across our organisation. So in many ways the launch of BNY Mellon Investor Solutions represents an expansion of our existing offering in to a single investment unit.

The bringing together of existing resources to form the BNY Mellon Investor Solutions function allows us to execute the five pillars of our approach to support the investment needs of our clients with greater precision; to consult with an investor to better understand their unique needs and preferences; to design a tailored solution specific to their needs; to execute on the solution according to their parameters; to analyse the investor's portfolio and provide a comprehensive risk assessment, and to provide the infrastructure to support their operating and governance requirements.

If there's a take-away message here, it's that we're launching BNY Investor Solutions for the benefit of our clients. The launch of BNY Mellon Investor Solutions is proof of our continued evolution towards a solutions-oriented investment platform- one that empowers our clients to access, with ease, the full array of products and services available across BNY Mellon to address their unique needs.

The value of investments can fall. Investors may not get back the amount invested.

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