

FUNDAMENTAL ASSET MANAGEMENT ANNOUNCED AS GROWTH INVESTOR AWARDS FINALIST

Submitted by: Fundamental Asset Management Ltd

Thursday, 23 July 2015

Up against Octopus Investments and Blackfinch Investments for Best BPR Investment Manager
Visit the Investor Growth Awards website (<http://www.growthinvestorawards.com>) for all finalists

Fundamental Asset Management has been shortlisted for the Best BPR Investment Manager for the 2015 Growth Investor Awards, which recognises impact beyond investment in the UK SME fund management industry. Fundamental is a leading provider of IHT solutions and has been successfully managing AIM portfolios since 2004.

Going up against Octopus Investments and Blackfinch Investments they will compete for the prestigious award, with the winner being revealed at the Growth Investor Awards black tie dinner held on 22 October at the Marriott Grosvenor Square, Mayfair, London.

The Awards are organised by Intelligent Partnership (IP), the UK's leading provider of research and education in alternative investments, and supported by partners including the UKCFA, BVCA and EISA. The sponsors of the inaugural Growth Investor Awards are Bovill, DWF LLP, LGBR Capital, Mainspring, Matrix Solutions, RAM Capital Partners, Reyker, and RW Blears.

Daniel Kiernan, Research Director of Intelligent Partnership, who headed up the shortlist, commented: "The judging criteria for the Growth Investor Awards was designed in consultation with the industry to ensure it is truly reflective of what is driving improvement and innovation. It's great to see such a high standard of entries in the inaugural year of these awards and fascinating to see how finalists are adding value while enabling growth. The shortlist has demonstrated that there is real innovation and impact in this industry."

Thirty five industry leading businesses and individuals have been recognized for awards including Financial Adviser of the Year and Wealth Manager of the Year for those best applying research and education in alternative investments to add value for clients diversifying their portfolios; Best Investment Platform, for equity crowdfunding and investment aggregation sites with the best user experience and product innovation; and Best EIS / SEIS / BPR / VCT Investment Manager awards for fund managers demonstrating innovation in product development, adviser engagement, and impact on SME growth.

Stephen Drabwell, co-founder of Fundamental Asset Management, said: "We are delighted to have made the final of the inaugural Growth Investor Awards and it reflects the hard work all of the team have put in over the last 11 years to make Fundamental one of the leading providers of actively managed AIM portfolios."

The shortlist was guided by an Advisory Board of industry leaders and influencers including Tony Langham, Chairman of Unbiased.co.uk & Chief Executive of Lansons; Sarah Wadham, Director General of the Enterprise Investment Scheme Association (EISA); Martin McCourt, former CEO of Dyson & director of Montagu Private Equity; Tim Hames, Director General of the British Private Equity and Venture Capital Association (BVCA); and Sherry Coutu CBE, angel investor, entrepreneur and Non-Executive Director of the London Stock

Exchange who authored The Scale-Up Report on UK Economic Growth in 2014.

Commenting on the importance of the Growth Investor Awards at a meeting of the Advisory Board, Tony Langham said: “The investment management industry does a great job for society, and helps millions of clients around the country with savings and pensions; but from a public policy point of view it’s under a lot pressure to show what it does for the real economy in terms of infrastructure, growth in jobs and wealth creation. These Awards provide a national platform to demonstrate the industry’s impact on SME growth.”

Commenting on the importance of tax efficient investments to the UK economy, Sarah Wadham said: “Some of our bigger companies are not developing new jobs, and in fact downsizing and shedding employees. Practically all growth in employment is coming from SMEs and they are largely funded by the Enterprise Investment Scheme. These companies don’t have any assets and banks can’t lend to them in their early stages so EIS and SEIS has really fuelled growth and innovation.”

Finalist entries will now go to a second round of judging to determine the winner in each award category. This independent panel of judges is drawn from within and outside the industry – to bring a range of perspectives and level the playing field. The winner of the Industry Champion Award will be voted for by the Advisory Board later in the year.

Guy Tolhurst, Managing Director of Intelligent Partnership, commented: “This is an exciting and growing industry and with that growth in competition there is a need for fund managers and platforms to differentiate in the eyes of the advisory community and the investors. The Growth Investor Awards help them to achieve that by telling the story of how they are putting money to work in UK SMEs.”

Winners will be revealed at the Growth Investor Awards black tie dinner held on the evening of Thursday 22 October at the Marriott Grosvenor Square in Mayfair, London.

Visit www.growthinvestorawards.com/shortlist for a full list of all finalists and information on how to attend the event.

Ends

Notes for Editors

About Fundamental Asset Management

Fundamental Asset Management Limited is an independent, owner-managed investment management firm with an unrivalled knowledge of the AIM market. It has provided AIM Portfolio Management with Inheritance Tax planning successfully to private investors, trusts and institutions for over 10 years. For more information and interviews contact Stephen Drabwell on 01923 713892 or mail to: sdrabwell@fundamentalasset.com or visit the Fundamental Website (<http://www.fundamentalasset.com>)

About Intelligent Partnership

As the UK's leading curator of education and insights on alternative investments, Intelligent Partnership increases awareness and engagement amongst intermediaries, providing them with the tools and information to speak knowledgeably with their clients about a broader range of investment options. Insights are delivered year-round through a programme of content which are accredited for Continuing Professional Development (CPD) by the Chartered Insurance Institute (CII), Institute of Financial Planning (IFP) and Personal Finance Society (PFS). Find out more at <https://intelligent-partnership.com/>.

The full programme of awards for 2015 is as follows:

1. Industry Champion
2. Exit of the Year
3. Most Impactful Investment
4. Industry Game Changer
5. Best Investment Platform, sponsored by Bovill
6. Financial Adviser of the Year, sponsored by LGBR Capital
7. Wealth Manager of the Year, sponsored by RAM Capital Partners
8. Best SEIS Investment Manager, sponsored by RW Blears
9. Best EIS Investment Manager, sponsored by Mainspring Fund Services
10. Best BPR Investment Manager, sponsored by Reyker
11. Best VCT Investment Manager, sponsored by DWF LLP
12. Growth Investor of the Year, sponsored by Matrix Solutions

The 2015 Advisory Board includes:

Sarah Wadham, Director General of the Enterprise Investment Scheme Association (EISA) who actively champions EIS within the adviser community

Martin McCourt, former CEO of Dyson & director of Montagu Private Equity who works with a variety of businesses and leaders to help them scale and grow

Mike Harris, Founding CEO of Egg & First Direct, former Chairman of Group Innovation at RBS and a regular speaker on leadership and innovation

Emma Jones MBE, CEO of Enterprise Nation, which represents the interests of over 75,000 small business owners and their advisers

Tony Langham, Chairman of Unbiased.co.uk & Chief Executive of Lansons, who has managed the reputation of some of the biggest names in the financial services industry

Tim Hames, Director General of the British Private Equity and Venture Capital Association (BVCA) who promotes the impact of the private equity and VC industry on UK economic growth

Sherry Coutu CBE, angel investor, entrepreneur and Non-Executive Director of the London Stock Exchange who authored The Scale-Up Report on UK Economic Growth in 2014

Lawrence Gosling is Group Editorial Director of Incisive Media and editorial director of its Financial Services Division – which includes Investment Week & Professional Adviser