



Our investment philosophy

Canaccord Genuity Wealth Management (CGWM) is an award-winning UK wealth manager, and one of the top 10 independent wealth managers in the UK.

CGWM is an important part of Canaccord Genuity Group Inc., a Canadian publicly listed company established in 1950. The wider Canaccord Genuity group is a leading global financial services firm, operating in wealth management and capital markets.

Our goal

Our clients are at the centre of what we do, and helping them to meet their personal investment requirements is our primary objective.

The best way for us to achieve this over the long term is by aiming to grow the real, inflation-adjusted value of each client's assets in accordance with their individual risk profile.

Our philosophy is founded on five core tenets

1. We believe in active investment management

We seek to add value to our clients through both asset allocation and investment selection.

Markets are often inefficient at pricing securities in the short to medium term but more efficient in the longer term. By exploiting those inefficiencies, we aim to enhance performance for our discretionary clients.

2. We believe that equities deliver the best real returns over the long term

Empirical evidence shows equities deliver better returns over time. This drives us to take a long-term approach, and by being active allows time for markets to correct pricing inefficiencies in our clients' favour. Importantly, it also allows us to ride out the volatility inherent in equity investing.

3. We believe that controlling risk is fundamental to protecting our clients' wealth in extreme market conditions

Investing in equities sometimes entails considerable risk, so we remain firmly committed to multi-asset class investment. This includes bonds and alternatives as essential portfolio building blocks to diversify our clients' risk, especially for lower- and medium-risk clients or those with shorter time horizons.

4. We believe investing cannot be segregated from the world we live in

In our opinion, sustainable companies that integrate environmental, societal and governance (ESG) factors into their day-to-day activities produce better returns over time. This makes sense for our clients, so we make ESG issues a key consideration in our investment process. In this way, we also play our part in creating a more resilient and sustainable global financial system.

5. We believe that a rigorously designed risk-profiling architecture is key to align client outcomes with their objectives and requirements

Taking account of each client's individual knowledge and experience, we carefully structure their discretionary portfolio to represent the amount of risk that they can afford, that they need, and that they are prepared to take.

Investment involves risk. The value of investments and the income from them can go down as well as up and you may not get back the amount originally invested.

How can we help?

If you'd like to know more about our investment philosophy, please get in touch with your CGWM Investment Manager or our Chief Investment Officer. They'll be happy to answer your questions and provide more details of all our services.

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Important information

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