

The Peregrine Difference

We are a specialist asset management marketing and communications firm. Our industry-specific knowledge, breadth of expertise and our unique data-led approach to strategy help firms create tangible differentiation.

We are one of very few specialist agencies able to orchestrate and deliver integrated campaigns. Bringing together corporate communications, design and branding with strategic insight, we work with clients to help them meet and exceed their objectives. And do so demonstrably.

With hubs in London and New York and affiliate partners in China, Australia and the Middle East, we support our clients around the clock.

Peregrine is an award-winning marketing and communications agency providing differentiated and integrated marketing solutions to the global financial services industry.

About us

Our offering is focused on forming strong partnerships with our clients, based on the quality of our advice, providing a proactive service and generating ideas that drive business success.

Mission Vision

Values Development

Company Culture

ESG. Philanthropy

Message Penetration

& Sponsorship

Analysis

Development



Strategy

Diagnostics & Benchmarking Analysis Messaging & Content Development Investor / Customer Journey Mapping White Space Analysis



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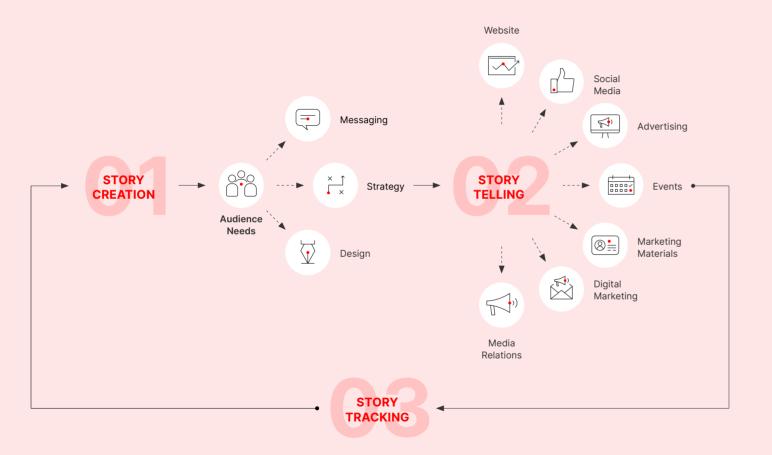
Brand Identity Website Design & Build Corporate Naming Video & Animation Pitch Decks



Engage

- Investor Reports Infographic Design Advertising Creative Email Marketing Corporate Photography
- Integrated Campaigns Media Relations Thought Leadership 8 Content Marketing Social Media Management Digital Advertising Crisis & Issues Management
- Internal Communications Podcast Production Presentation Training Media Planning & Buying Webinar Production

How We Work

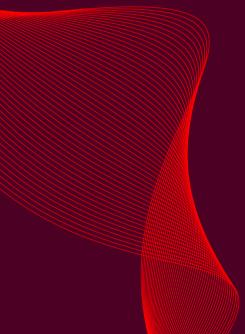


Selected Client List

400 Capital Management	Cantab
A-Cap	CITCO
Aaro Capital	Clocktower
Advent	Cobblestone
ALFI	CQS
Allspring	Credit Suisse
Artisan	Crestbridge
Asean	Dalma Capital
Axonic Capital	Dexion
Blackstone GSO	DGS Partners
Brevan Howard	Dome Equities
Bregal Milestone	DSC Meridian
C-Cap	dv01
CA Ventures	Elefant Markets
Cadian	El Sturdza
Cambridge Associates	Eighteen 48

EJF Capital	Oaktree
Equinox Partners	Omni
Euroclear	Orchard Global
FIM Partners	Penso
Finisterre	Phoenix IA
Gatemore	Quest Partners
Haidar	RFA
Harvest	Robeco
Highbridge	Sackville
HITE	Selwood
Hudson Structured	Sightway
KAH Capital	Smith Graham
Maniyar	UBP
Medalist Partners	Wells Fargo AM
Mirae	Willis Towers Watson
Natixis IM	Yoo Capital

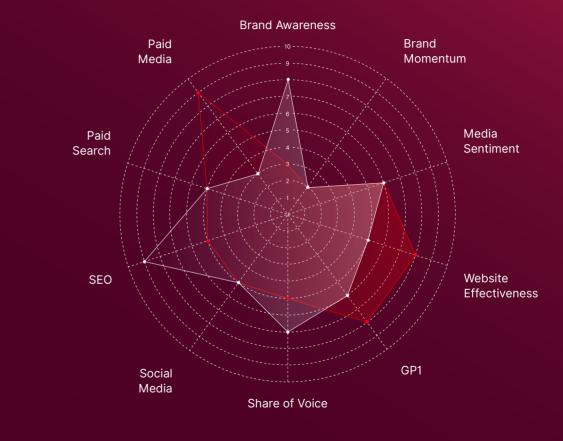
Diagnostics & Benchmarking Analysis



Our proprietary research methodology provides insight into how a firm is perceived and its brand presence globally (or regionally), while laying out a strategic roadmap to inform marketing campaign planning and business development.

Key Benefits:

- Create a marketing communications strategy built on a data-driven understanding of the firm's current positioning.
- Compare Integrated Marketing Communications Performance ('IMC') with your peer group and industry and set and track meaningful goals that support a firm's business objectives directing budgets to where they can generate the greatest impact.
- Gain intelligence on competitor's strategies and provide internal stakeholders with
 a concrete rationale for decision-making.



Dedicated ESG Practice



Asset managers are now under enormous pressure to talk about their approach to responsible investing with ESG communications at the forefront of investors' minds. We understand the need to effectively communicate ESG capabilities within a landscape that is overwhelmed with similar narratives, which is why we have a dedicated ESG practice.

With continuous demands to provide innovative ESG solutions, it is crucial to build a brand and communications strategy that is differentiated. Utilizing the findings from both our strategic analysis and robust annual ESG research, we work with you to create a strategy that resonates with target audiences and provides a clear solution to their needs.



• Peregrine's mission with the announcement of Wells Fargo AM's sale to private equity buyers was to ensure the narrative of the asset management business unit and its CEO Nico Marais permeated globally and would not be drowned out by the narratives of the buyers and Wells Fargo.

Strategy

- Peregrine established key messages which were trial tested with the key stakeholders. On the day of the sale announcement, we leveraged WFAM's CEO with journalists in order to ensure WFAM's messages cut through and built on the buyers' and Wells Fargo's communications.
- These messages were linked to a bigger picture story, ensuring that WFAM's core messages come across via media coverage.
- Peregrine has been providing ongoing media relations programme to Wells Fargo AM, now known as Allspring Global Investments, for over a decade.

Results

- 140 pieces of media coverage worldwide.
- Achieved extended profiling pieces with targeted high impact publications from one-to-one interviews with the CEO of WFAM

 Financial Times, Bloomberg, Institutional Investor, P&I, Citywire Selector.
- Highest Google search volume in the U.S. for WFAM in more than 15 years. Globally, search volumes for WFAM were almost 25 times higher than the 10-year average.
- These articles are the first thing audiences searching for WFAM will come across – and crucially all articulate the **positive messaging** developed to tell WFAM's side of the story.
- Watch the video on our website.



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Finance & economics

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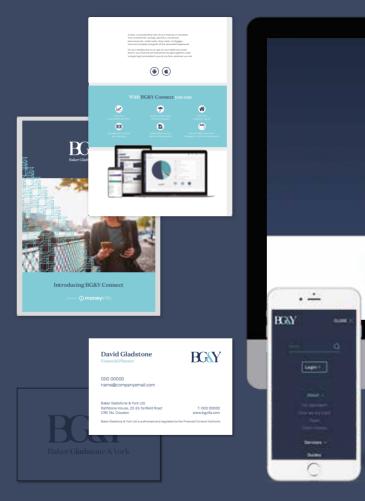
• We worked with BG&Y, an established IFA, to modernize their brand identity, website and communications materials.

Strategy

- BG&Y is a long-established IFA in London with a dedicated client base. When they approached us their brand had fallen behind the standard of the market. They wanted to appeal to a wider audience and connect with them emotionally.
- In our Discovery & Messaging sessions we identified the & (ampersand) as a key component of the relationship between IFAs and their clients. We decided that this would be the element to anchor the brand. Its versatility was employed across the website, brochures, investor portal app and all marketing collateral.

Results

- Increase in page views of 280%.
- Email campaigns saw a CTR 11 times higher.
- LinkedIn sponsored content and email campaigns led to an **191%** increase in visitors.
- Google search campaign generated a 48% increase in overall website traffic and a 24.3% increase in visits to the 'Get in touch' page.
- Watch the video here for full details.





Baker Gladstone & York helps people align their financial future with their life goals.









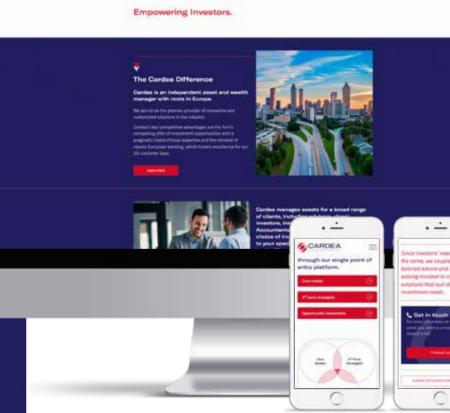
Following a corporate transaction, CCA entrusted Peregrine to lead a comprehensive proposition and visual brand redevelopment.

Strategy

- This comprised of corporate and client messaging as well as the creation of a logo, responsive website design and investor materials.
- The Cardea Difference positioned the firm as a premiere asset and wealth management solution provider for independent advisors, financial managers, accountants and investors.
- We helped emphasise CCA's global mindset and co-community culture to differentiate it from the U.S.centric focus of most turnkey asset management providers.

Results

- **Differentiated messaging** which clearly articulates Cardea's edge.
- Modern and progressive **brand identity.**
- Cohesive brand materials and marketing collateral.
- Watch the video on our website.



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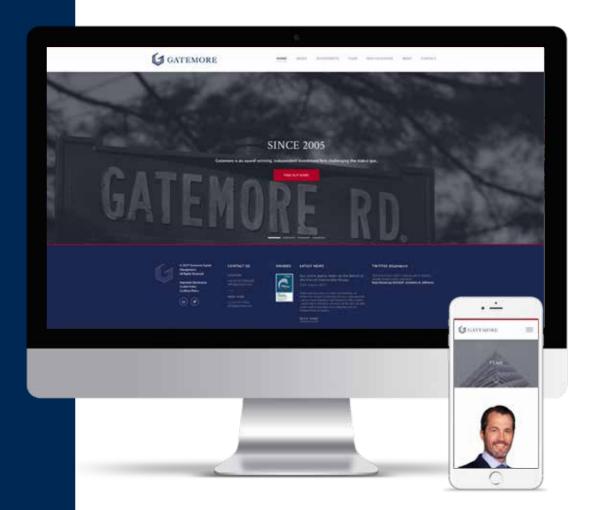


• We planned and executed a Media Relations campaign that supported Gatemore Capital Management's activist stakes in UK-listed companies, French Connection and DX Group.

Strategy

- We were briefed to put together a campaign that would increase pressure on the Boards of French Connection and DX Group to yield to Gatemore's demands and increase shareholder value.
- In our messaging sessions, we identified that there was an opportunity to take advantage of specific corporate governance failings in the target companies by engaging with the media and leveraging letters presented by Gatemore.

- Results
- The board of DX Group acquiesced to Gatemore's demands and has agreed to appoint Gatemore's nominees.
- Gatemore earned **24**% on exiting its position in French Connection.
- Liad Meidar, Gatemore's CIO, was nominated as CITY AM "Investor of the Year."
- Watch the video on our website.



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name@companyemail.com

Gatemore Capital Managemen 33 Cavendish Square, London W1G 0PW

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GATEMORE



- Establish Harvest Global Investments as experts in Chinese and Asian markets.
- Build recognition of Harvest's funds amongst sophisticated European investors.
- Create a modern and dynamic brand to be used across all marketing materials.

Strategy

- We worked with Harvest's executive team to create a new set of corporate messages, including the strapline: "Invest China. Think Harvest."
- Brief Harvest portfolio managers and executives in advance of interviews with top-tier financial journalists.
- Design a new website and new marketing material, including writing the copy.
- Position the Harvest investment team as expert commentators on major Chinese market events, such as MSCI's inclusion of A-Shares in its EM Index.

Results

- In the first year, Peregrine secured over 450 pieces of coverage for Harvest.
- Highlights included a profile of Chairman, Dr. Henry Zhao, in The Financial Times, and broadcast appearances for their CIOs on CNBC and Bloomberg.
- Creation of optimised, re-designed marketing and communications material for digital and print media.
- View further case study details on our website.



Harvest Good Investments

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Our investment managers know that China's infrastructure wonders didn't start and finish with the Great Wall. The country's megacities are due to grow by 250 million people over the next 10 years.

FOR A FAMILIER GROUP

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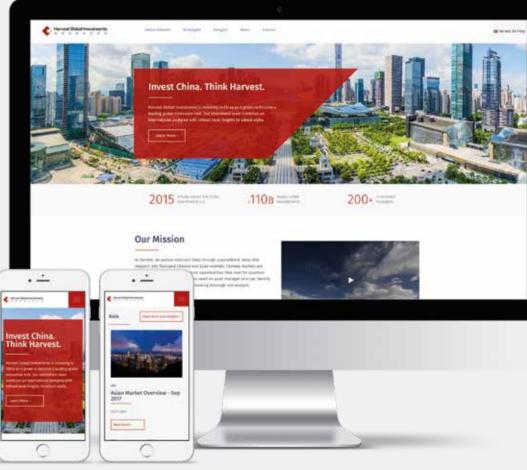
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We're helping to make that happen

Invest China. Think Harvest.

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 We supported the Centre for Climate Finance & Investment at Imperial College Business School in its mission to help shape a global energy transformation through the fusion of business, technology and an entrepreneurial mindset. Goal was to build confidence and position WFAM as a stable and visible force that clients were available to connect with.

Strategy

- Peregrine established key We worked alongside Imperial's research teams to develop key messages to promote their mission and industry-leading thought leadership reports.
- These reports cover vital sustainability issues from renewable energy returns to emerging market green bonds and portfolio capitalization on lowcarbon transition.

Results

- 572% increase in page views
- 906% increase in time spent on page.
- "Peregrine's deep understanding of Environmental, Social and Governance investment, coupled with its expertise in bringing our key messages to life in the media in a clear and creative way has been invaluable." - Charles W. Donovan. Professor of Practice & Executive Director, Centre for Climate Finance and Investment.
- Watch the video on our website.

B Imperial College | Centre for Climate Business School Finance & Investment

Energy Investing: Exploring Risk and Return in the Capital Markets

A Joint Report by the International Energy Agency and the Centre for Climate Finance & Investment

lune 2020, 2nd Edition



Climate Vulnerable Countries Face \$168 Billion In Higher Debt Costs



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March 2021

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By Will Mathia and Diversity Name

Green energy acquisitors up 64% the year in Europe

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Green Power a Bright Spot in

Europe's Bleak Deals Market

Signup to receive the Green Daily daily newsletter

With bankers stuck at home and dealmaking mostly

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acquisition activity in Europe this year.



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Activists raised climate risk as a problem to encourage finance to rogage in addressing the challenge. The law of unintended

Jonathan Amacker Charles Donovan

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Climate Change and the Cost of Capital in Developing Countries





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Clean power stocks outperform fossil fuel peers during pandemic

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Clean power stocks have weathered the coronavirus crisis better than their eers in sil and gas, any monach has shown, as the oil price shock and paralemie shift the landscape for energy intenting

US clean power stocks now 2.2 per cent in the first four months of the year. while their food had peers fell any per cent, according to a study by Imperial College London and the International Energy Agency. The S&P top fell 9.4 per cent during the same period.

"We found that renewable power had a lot of a propertive property, and that is scattering we did not know before," said Miller Plankey, a researcher at Experial and our of the report's authors, "After this kind of shock [in the

Just How Good An Investment Is Renewable Energy? New Study Reveals All



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Renewable energy investments are delivering massively better whereas there fossill foods in the U.S., the U.K. and Europe, but despite

Imperial College Centre for Climate Business School Finance & Investme



Clean Energy Investing:

Global Comparison of Investment Returns

March 2021



A Joint Report by the International Energy Agency and the Centre for Climate Einance & Investment



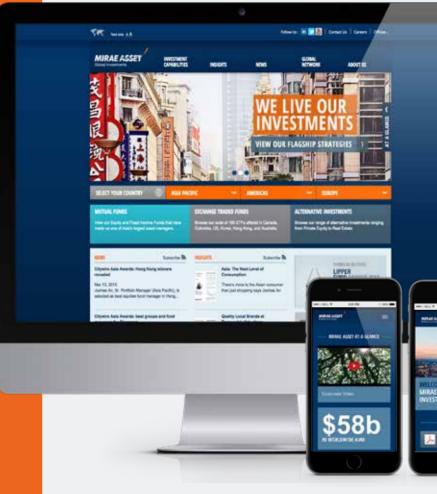
- To establish in the UK and Europe the brand presence of Mirae Asset Global Investments, the largest Asia-based investor in emerging market equities.
- To build understanding and acceptance of Mirae Asset's 'Asia Great Consumer' and 'Asia Sector Leader' fund strategies amongst key target investors.
- To successfully support the raising of assets for Mirae Asset's core SICAV range.

Strategy

- Strong product and corporate messaging culminating in the development of the 'We Live Our Investments' slogan – now deployed as a fundamental aspect of Mirae Asset's brand strategy.
- Redesigned the UK / HK websites to convey a strong and consistent brand identity, with supporting video, filmed and edited by Peregrine.
- High value, high impact media relations: corporate and fund manager profiles and guest articles, with media training for executives prior to interviews.
- A global brand-building advertising campaign across both print and digital in 2014/15.

Results

- Mirae Asset's core SICAV range total AUM grew from \$150mn to \$1.75bn in 14 months.
- Mirae Asset has become a recognised brand and a leading voice in the emerging market equities space in the UK and Europe.
- View further case study details on our website.









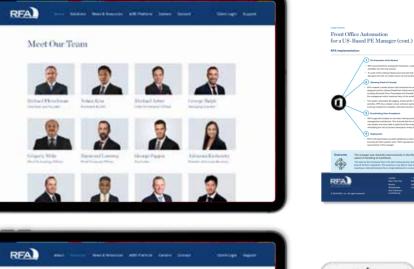


• We helped RFA sharpen their value proposition to clients through more tightly targeted corporate messaging and a brand update.

Strategy

- We sought to create high impact, memorable branding with an institutional look/feel that would showcase RFA's leadership in technological innovation and its outstanding record of client-led service excellence.
- This saw Peregrine redesign the RFA website and create message differentiators focused on the key service groupings and what each provides to the firm's four client segments.

- Results
- Increased traffic from search engines by 309%.
- Increased session duration by 15 seconds.
- Increased traffic to careers page by 927%.
- Doubling of LinkedIn followers in 2019.
- Sustained coverage from media outlets that focus on alternative funds and related market segments.
- Watch the video on our website.





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Front Office Automation for a US-Based PE Manager

to immove its deal management workflows

CASE STUD

Overview

The Challenge

RFA Solution



The Opportunity

A US-based private equity manager with over \$12.4B in AUM and a 90-person team The DE firm was using a traditional file server matern that strend The Put time was using a traditional the server system that server workflows locally and used a conventional approach. This required users to manually save, log, regarize and maintain all files, including deal flows in various stages.

Due to the localized storage, the manager relied on third-party solutions for CRM, compliance and deal management with east installed directly on individual machines, creating additional workflow hurdles.

Reducted Fire is different stress of secondaria Indundant files in different stages of complete ystem inconsistencies, and file version control ecame highly complicated and overwhelming.

Compliance risks were generated by the lack of a unified file structure and governance of process



The proprietary solutions also made the system solidy is maintain and analytic is meet follow Collaboration between research analysis and portfolio managers was also much bes eclerencies and productive due to painly tritegration across multite, cloud and other across anitise. ds assessment, use implementation

anagement Solution

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The Opportunity

The manager's current platform was costly maintain due to cultized and include.

REA

The manager saw dramatic improvements in the flexible manag-seed of handling of workflows.



After a full audit and nearly assessment RFA designed and implemented a d RFA designed and implemented a docum management system that utilized busines process automation. The solution automated data synchronization between platforms, as well as how the data was applied throughout front office workflows for management and compliance purposes.

created by integrating third-party providers with different standards in

ALAN HOWARD JW3 SPEAKER SERIES

Objectives

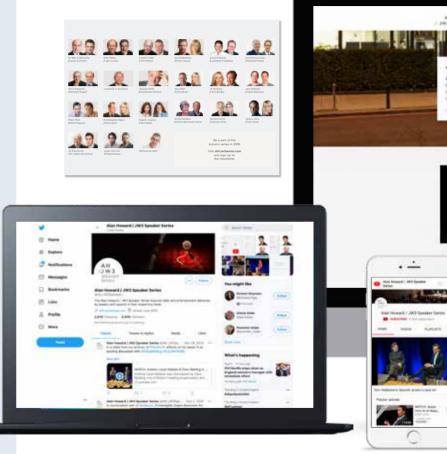
• The Alan Howard / JW3 Speaker Series (Speaker Series) commissioned Peregrine to plan and execute an IMC strategy that would promote their events.

Strategy

• Our remit was to design a logo, look and feel that would remain consistent throughout all the Speaker Series' marketing materials, create a strong online presence for the Speaker Series, create a loyal following to boost the ticket sales and reputation of the Speaker Series, make sure that the content created as a result of each event was leveraged to maximum effect, facilitate conversations, talks and entertainment delivered by leaders and experts in their respective fields.

Results

- 145K+ impressions.
- 17K+ video views.
- 450+ link clicks.
- 57% increase in page views.
- · Watch the video on our website.



ALAN HOWARD JWI MEAADE SHEEL





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Crestbridge: one of the first

super-ManCos

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CRESTNRIDGE

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1 company in Luxembourg with an EuVERA licence

The only 3rd-party management

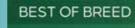
ManCo

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BRINGING TOGETHER LEADING FUND DISTRIBUTORS AND ASSET MANAGERS FROM AROUND THE WORLD

Our people. Your value.





...all with long-term track records of outperformance, and make their award-winning products available to our European investors through UCITS funds.

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We've sore exceeded our gicinal furnil proposition

Bespoke solutions for fund managers



Fund Administration

Regulatory and Governance Solutions

CRESTERIOGE

Network of offices



EMERGING FROM COVID a wilderness year, or a pause to reinvent distribution?







the hedgefund

journal

2021

Best content targeted to the CSR community Corporate Content Awards North America

the 2019, 2018, 2017, 2016 hedgefund **Best Marketing** journal & Communications Consultancv Hedge Fund Journal Awards

Leading Public

Relations Firm

& Communications Consultancv US Service Awards 2018, 2017, 2015

Best Marketing

Consultancy

Service Awards

Best Financial

Campaign

Communications

The Chartered Institute

of Public Relations

2001

& Communications

HFMWeek European Hedge Fund

2019, 2018, 2017

Best Marketing

HFM 2020, 2019, 2018 , 2017, 2016 AWARDS Best Marketing & Communications

Consultancy

HFM US Hedae Fund Services Awards

2016 \$ **Best Global Marketing** hedgeweek & Communications Firm Hedgeweek Awards

the 2019 hedgefund **Outstanding Contribution in** iournal Marketing Communications

Lifetime Achievement Award Anthony Payne



HFMWeek European Hedge Fund Service Awards

HFM 2016 AWARDS Best European Marketing & Communications Agency

> HFMWeek European Hedge Fund Service Awards

2015, 2014, 2013, 2012, 2011

Hedge Fund Journal Awards



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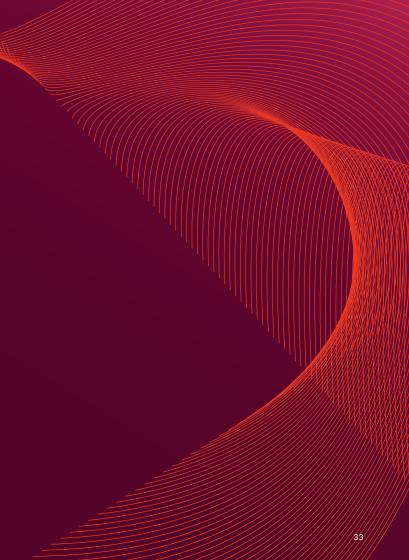
AWARDS

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AWARDS

Best European Public Relations Firm The Hedgeweek Global Awards







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