



Peregrine®

A woman in athletic wear is running on a sandy beach towards the right. The background is a soft-focus view of the ocean and a hazy, orange-tinted sky at sunset or sunrise. The overall mood is energetic and aspirational.

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, supporting special situations like shareholder activism or ongoing LP engagement and brand building. 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 and execution. We provide a proactive service and generate ideas and tactics that drive success across campaigns.



Strategy

- Diagnostics & Benchmarking Analysis
- Messaging & Content Development
- Investor / Customer Journey Mapping
- White Space Analysis
- Mission, Vision, Values Development
- Company Culture Development
- ESG, Philanthropy & Sponsorship
- Message Penetration Analysis



Engage

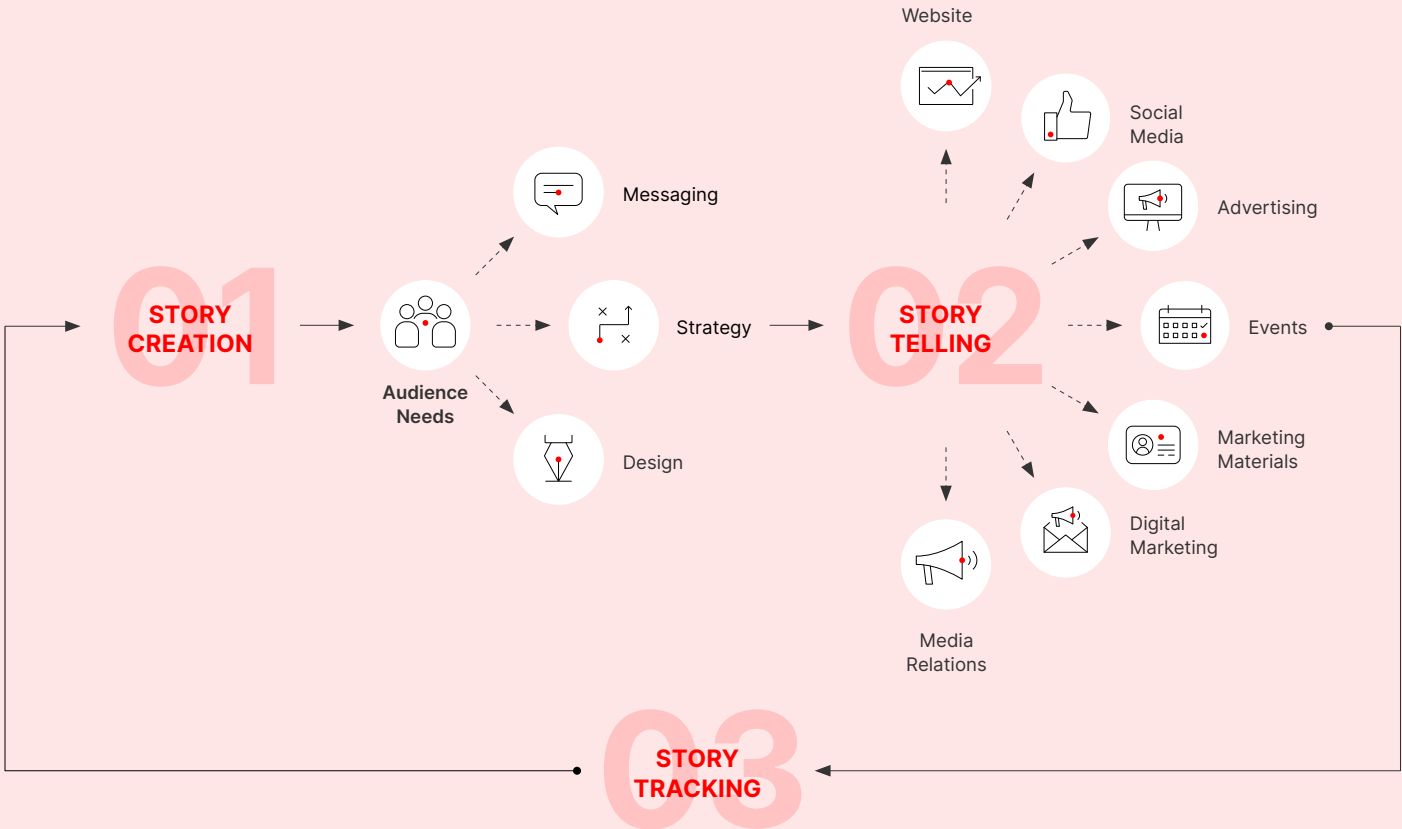
- Integrated Campaigns
- Media Relations
- Thought Leadership & Content Marketing
- Social Media Management
- Digital Advertising
- Crisis & Issues Management
- Internal Communications
- Podcast Production
- Presentation Training
- Media Planning & Buying
- Webinar Production



Design

- Visual Identity
- Website Design & Build
- Corporate Naming
- Video & Animation
- Pitch Decks
- Investor Reports
- Infographic Design
- Advertising Creative
- Email Marketing
- Corporate Photography

How We Work



Selected Client List

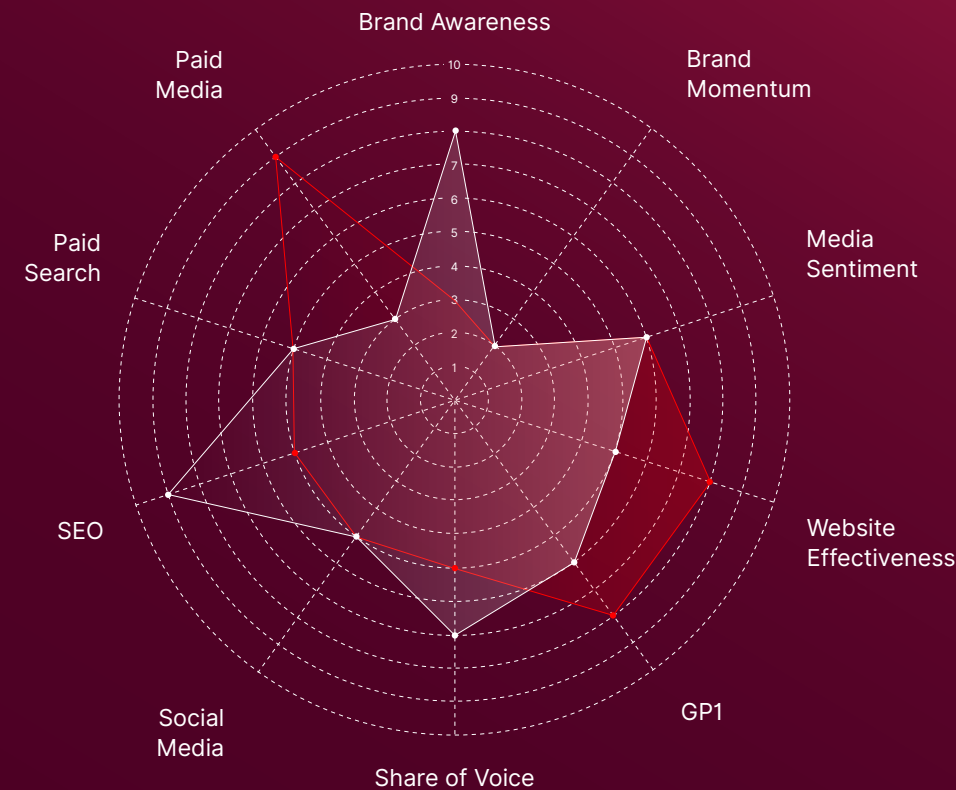
400 Capital Management	Cantab	EJF Capital	Oaktree
A-Cap	CITCO	Equinox Partners	Omni
Aaro Capital	Clocktower	Euroclear	Orchard Global
Advent	Cobblestone	FIM Partners	Penso
ALFI	CQS	Finisterre	Phoenix IA
Allspring	Credit Suisse	Gatemoore	Quest Partners
Artisan	Crestbridge	Haidar	RFA
Asean	Dalma Capital	Harvest	Robeco
Axonic Capital	Dexion	Highbridge	Sackville
Blackstone GSO	DGS Partners	HITE	Selwood
Brevan Howard	Dome Equities	Hudson Structured	Sightway
Bregal Milestone	DSC Meridian	KAH Capital	Smith Graham
C-Cap	dv01	Maniyar	UBP
CA Ventures	Elefant Markets	Medalist Partners	Wells Fargo AM
Cadian	El Sturdza	Mirae	Willis Towers Watson
Cambridge Associates	Eighteen 48	Natixis IM	Yoo Capital

Diagnostics & Benchmarking Analysis

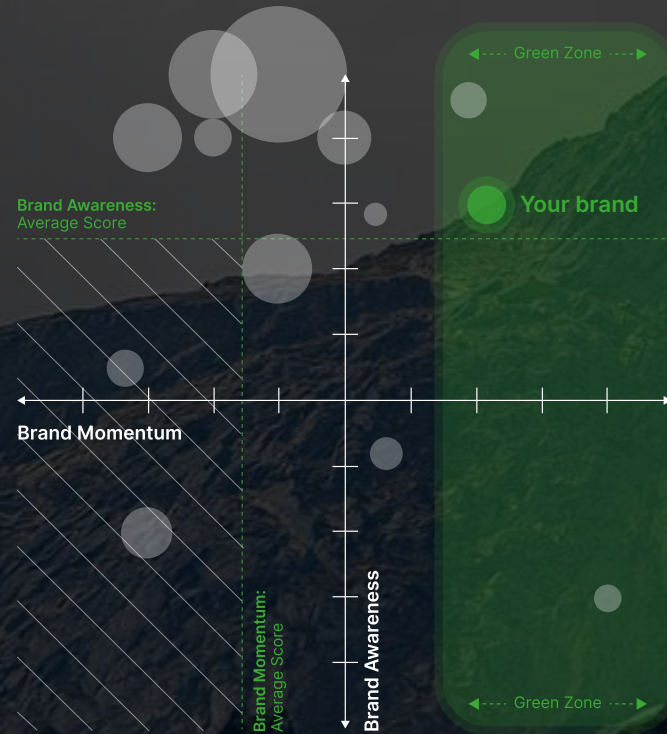
Our proprietary research methodology provides insight into how a firm is perceived and its brand presence globally (or regionally), while laying out a strategic roadmap to inform marketing and activism campaign planning and business development.

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 and external 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.

Objectives

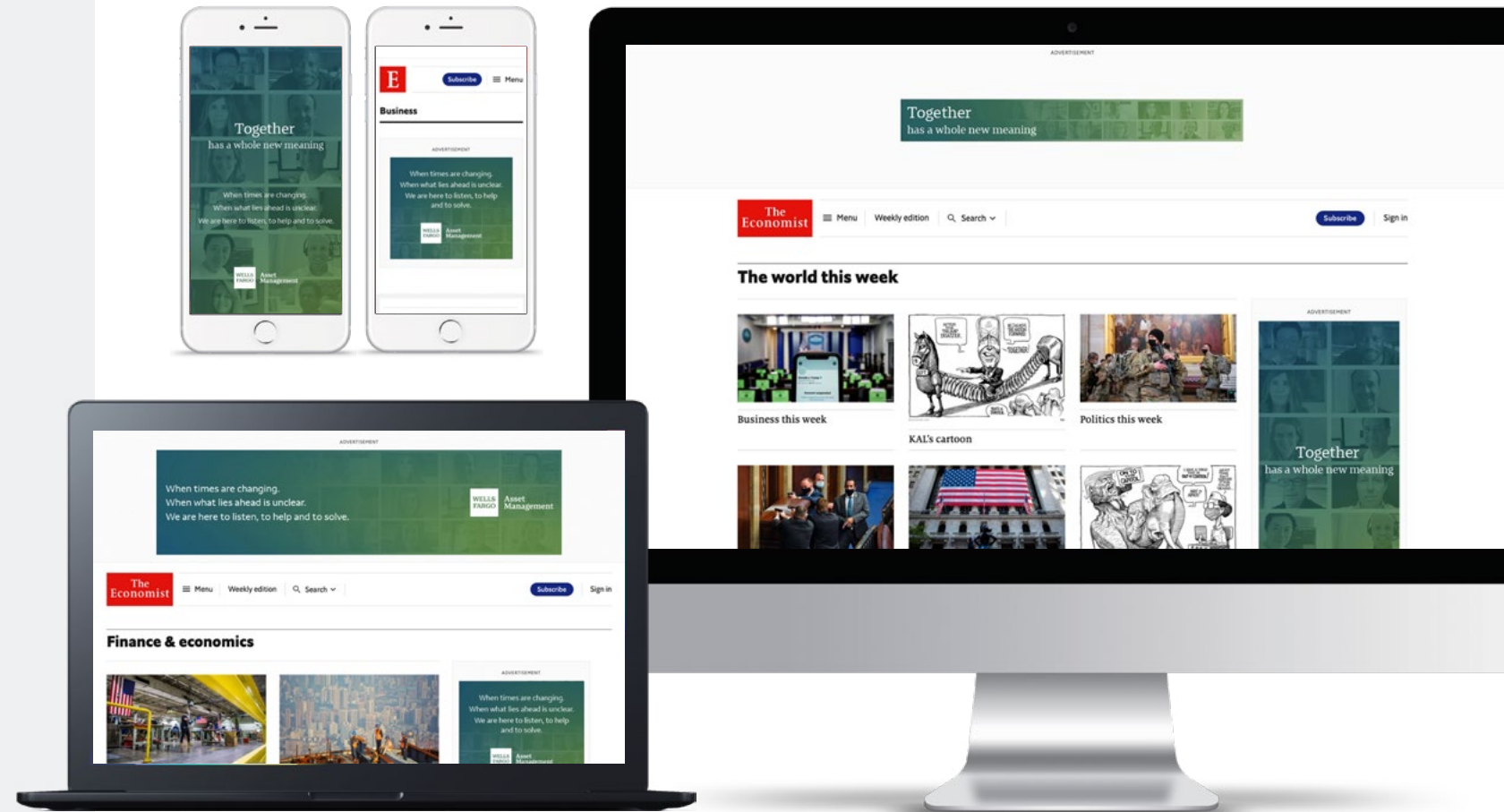
- Peregrine's mission with the announcement of Wells Fargo AM's sale to private equity buyers was to ensure the narrative of the asset management business unit and its CEO Nico Marais permeated globally and would not be drowned out by the narratives of the buyers and Wells Fargo.

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.



Objectives

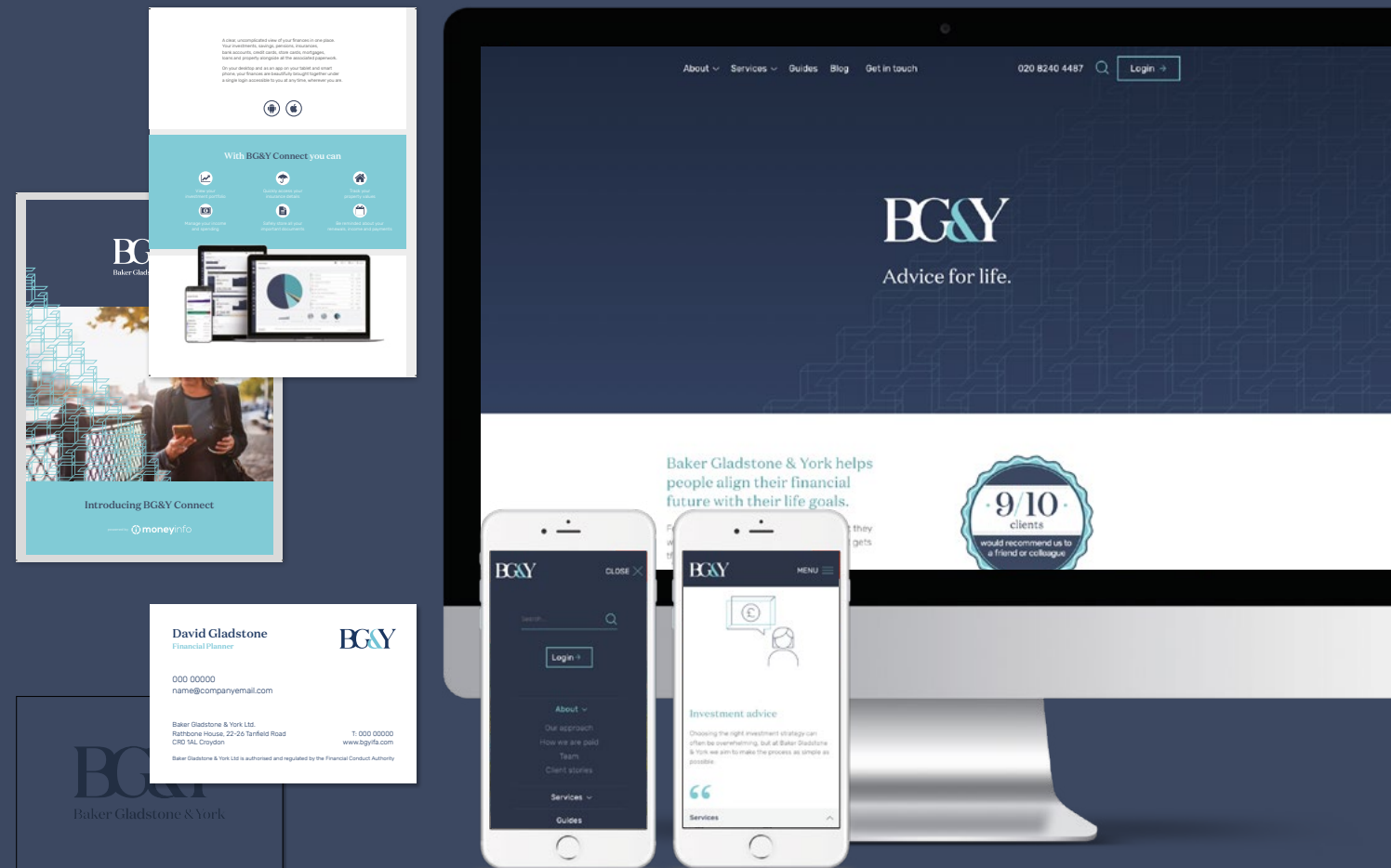
- We worked with BG&Y, an established IFA, to modernize their brand identity, website and communications materials.

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.





Objectives

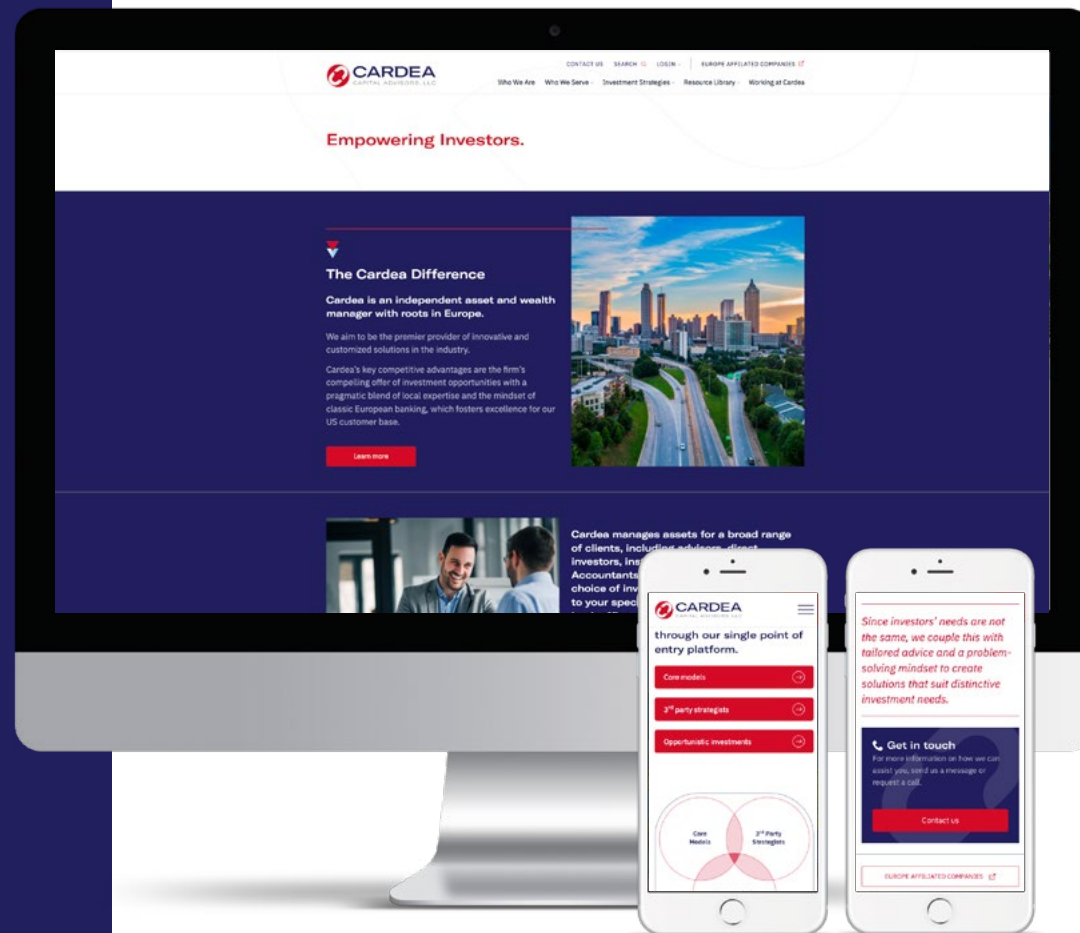
- Following a corporate transaction, CCA entrusted Peregrine to lead a comprehensive proposition and visual brand redevelopment.

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.



Objectives

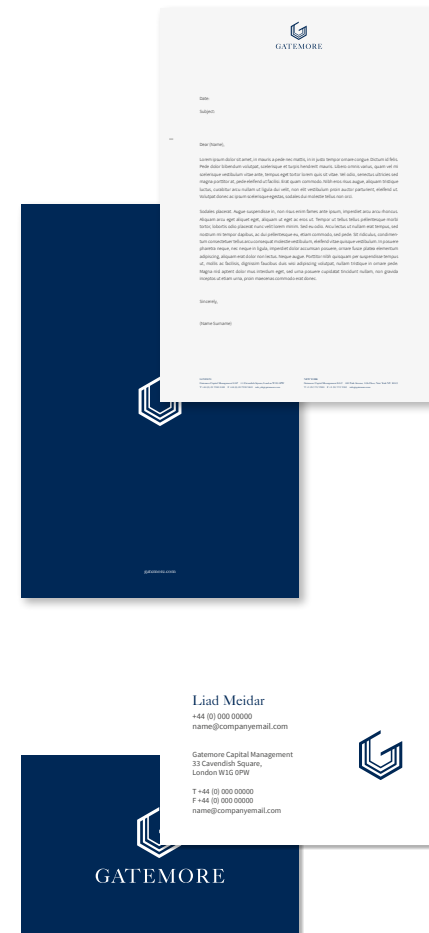
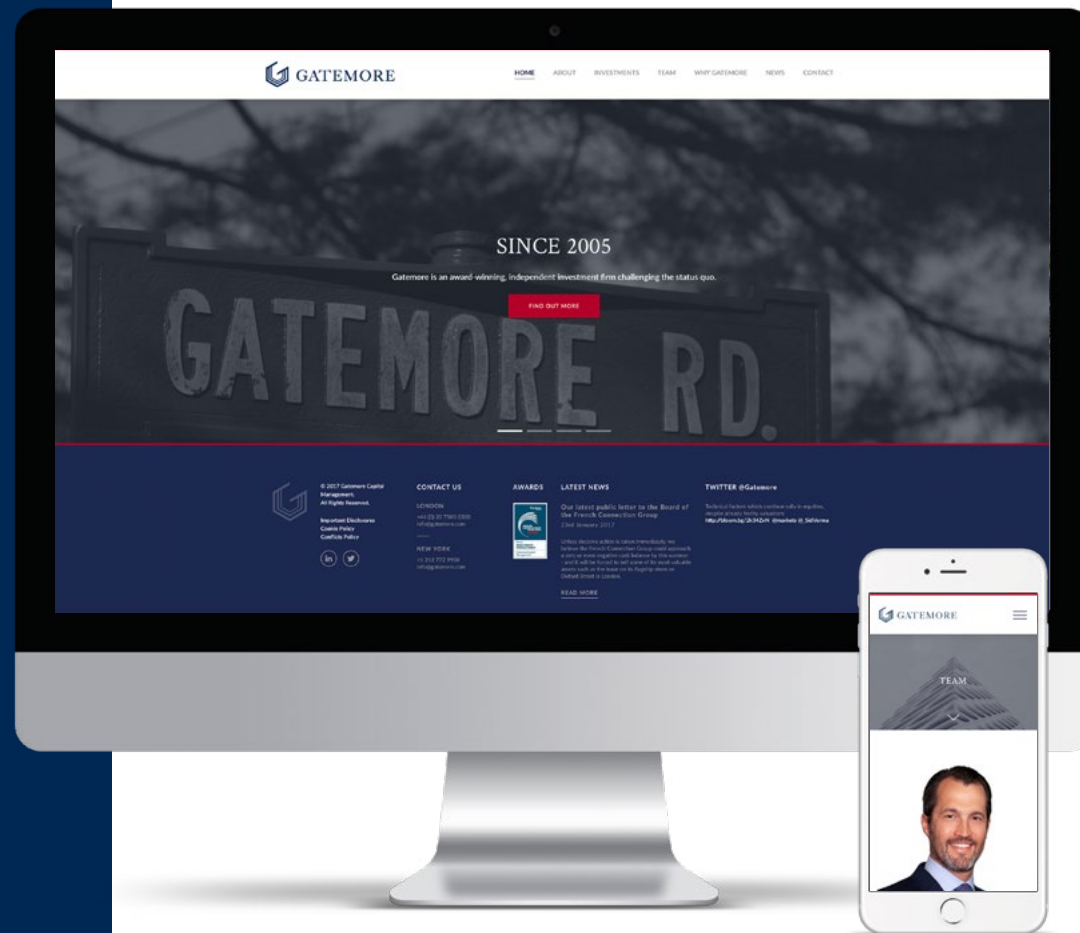
- We planned and executed a Media Relations campaign that supported Gatemore Capital Management's activist stakes in UK-listed companies, French Connection and DX Group.

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.



Objectives

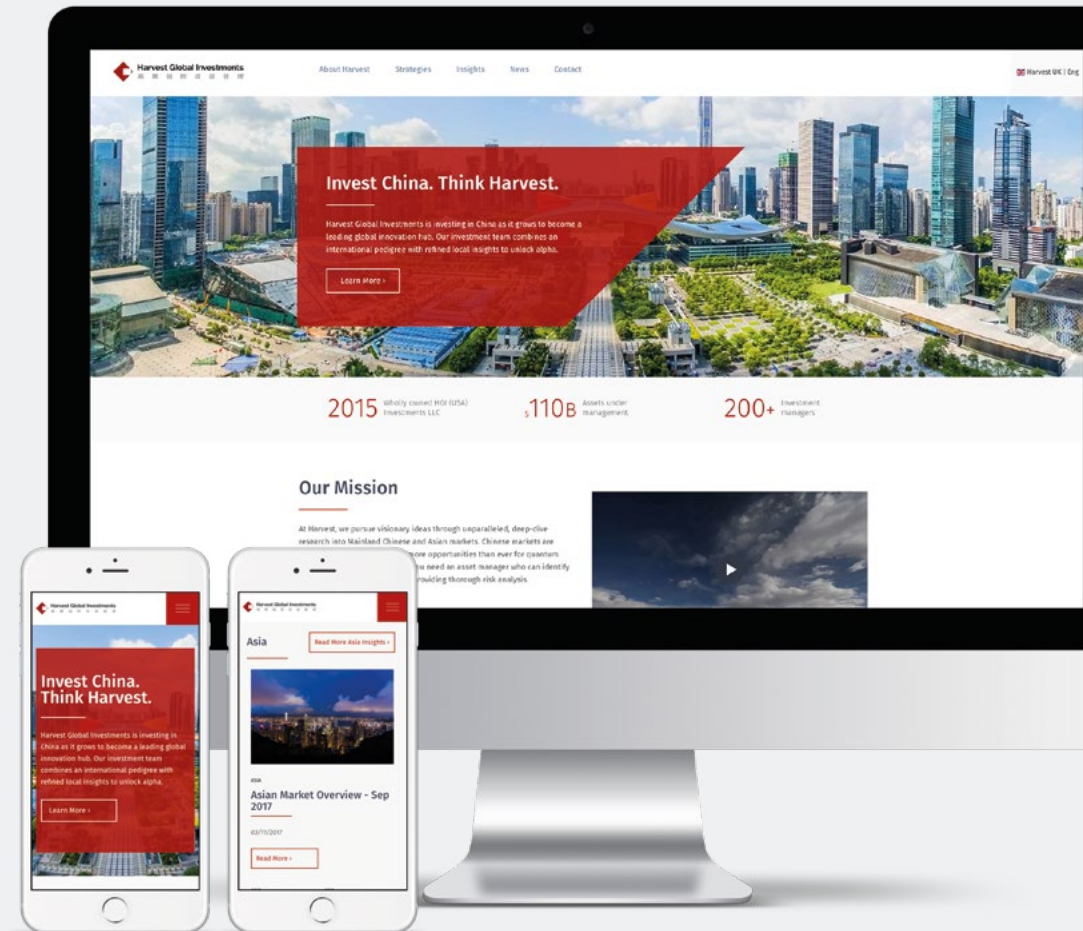
- Establish Harvest Global Investments as experts in Chinese and Asian markets.
- Build recognition of Harvest's funds amongst sophisticated European investors.
- Create a modern and dynamic brand to be used across all marketing materials.

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.



Objectives

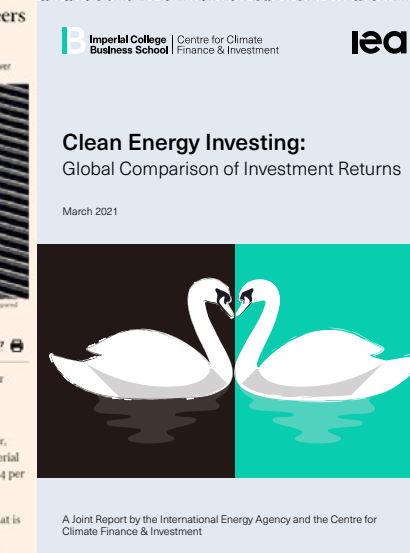
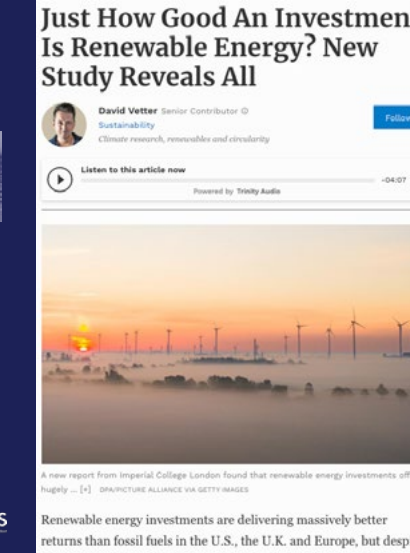
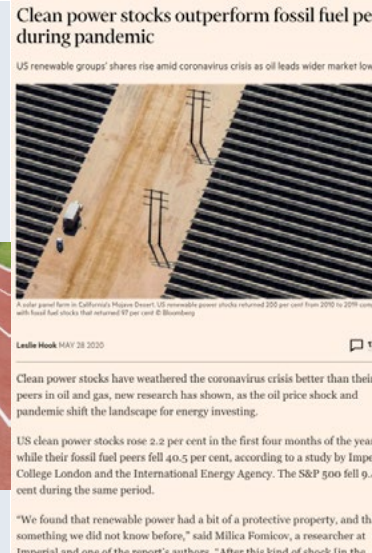
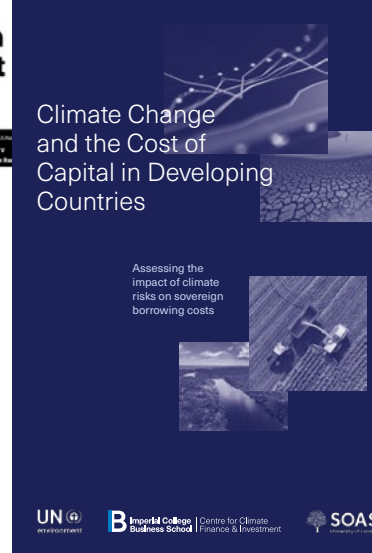
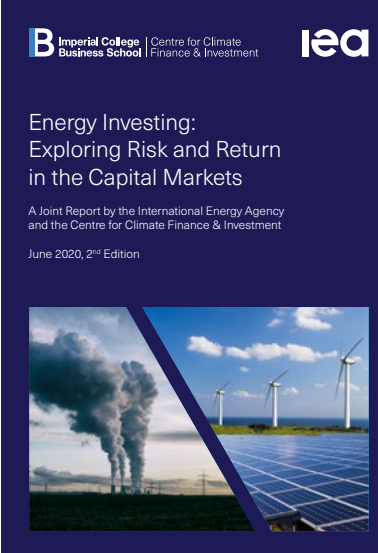
- We supported the Centre for Climate Finance & Investment at Imperial College Business School in its mission to help shape a global energy transformation through the fusion of business, technology and an entrepreneurial mindset. Goal was to build confidence and position WFAM as a stable and visible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



Objectives

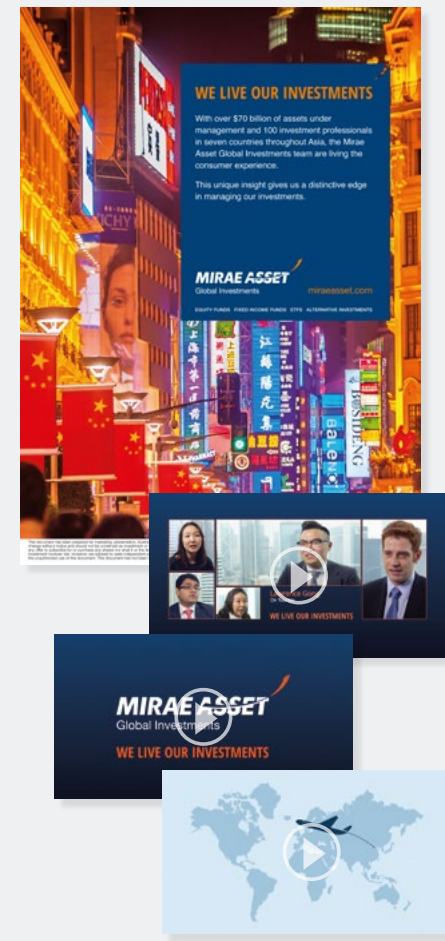
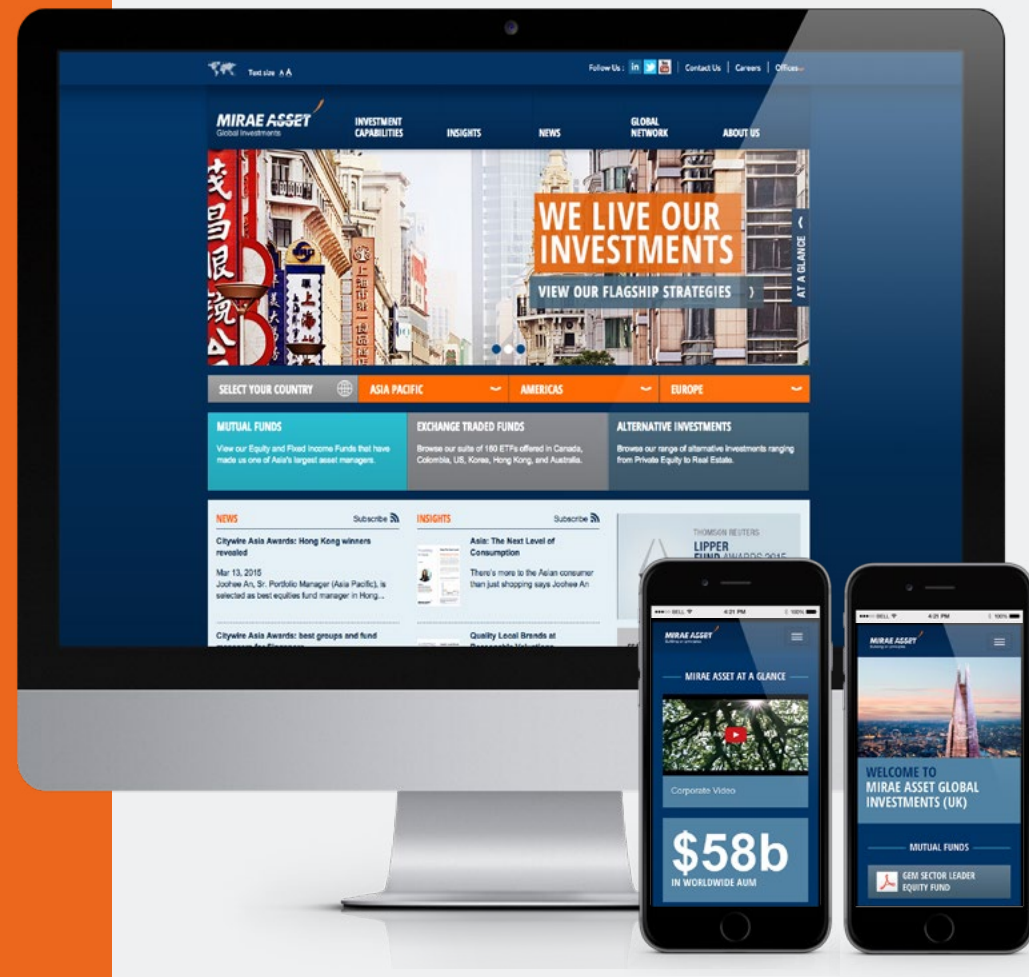
- To establish in the UK and Europe the brand presence of Mirae Asset Global Investments, the largest Asia-based investor in emerging market equities.
- To build understanding and acceptance of Mirae Asset's 'Asia Great Consumer' and 'Asia Sector Leader' fund strategies amongst key target investors.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



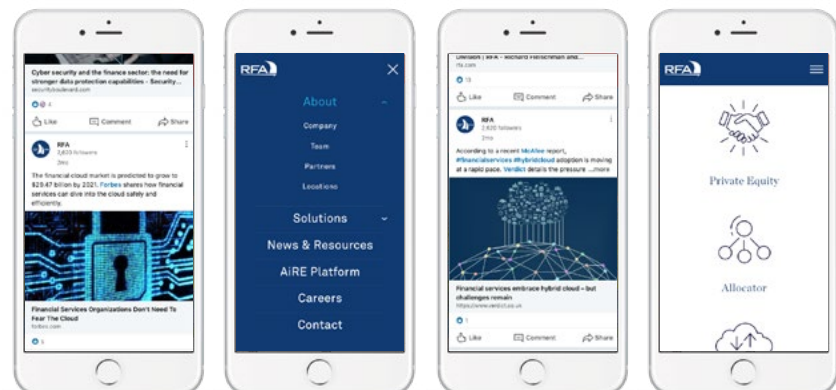
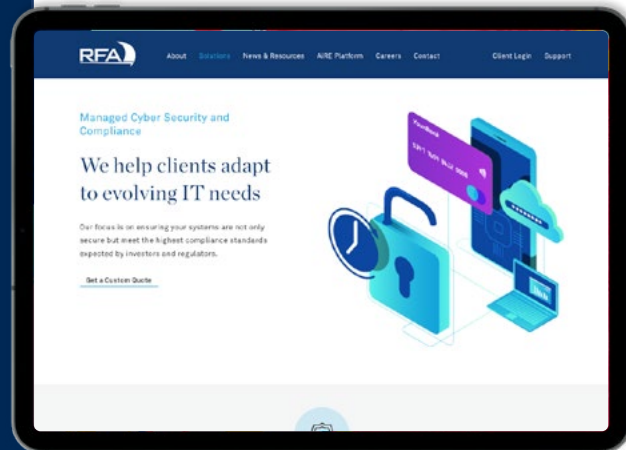
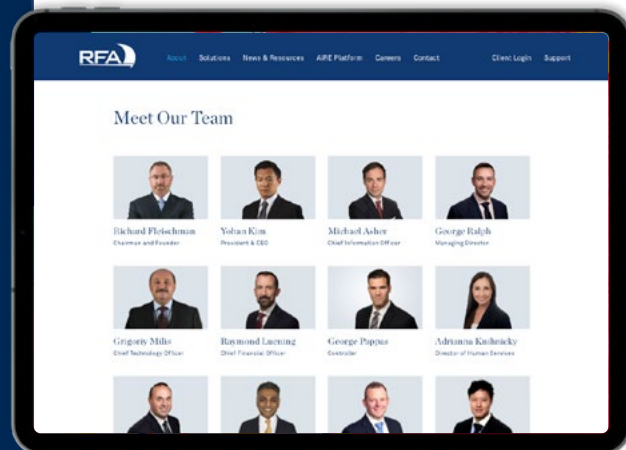


Objectives

- 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.



EQUINOX PARTNERS

Peregrine was tasked with supporting Equinox Partners, a value investor focused on precious metals miners (long-only), energy E&P, and emerging markets as the firm undertook two shareholder activism campaigns.

The purpose of this brief was to raise the profile of the campaigns in the media, highlighted the following disruptors to board and shareholder alignment:

- Egregious executive payouts in mining M&A | Teranga Gold Corp and Endeavour Mining Corp deal
- A lack of alignment and transparency in mining sector board governance and ownership

Strategy

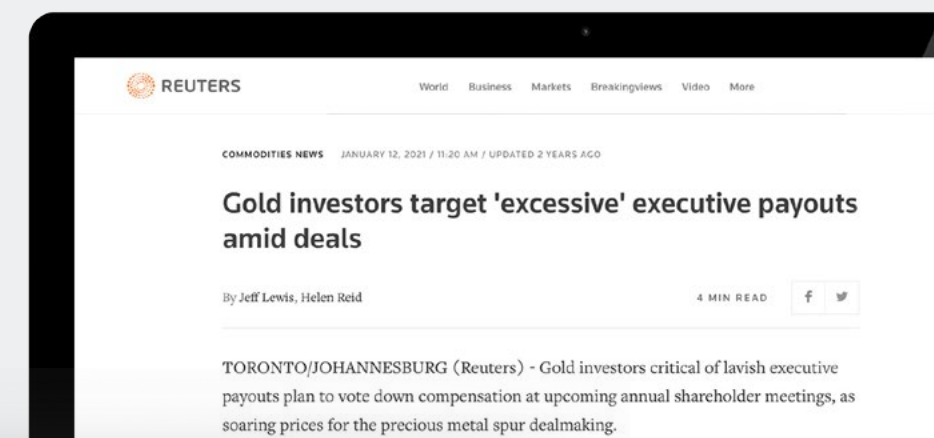
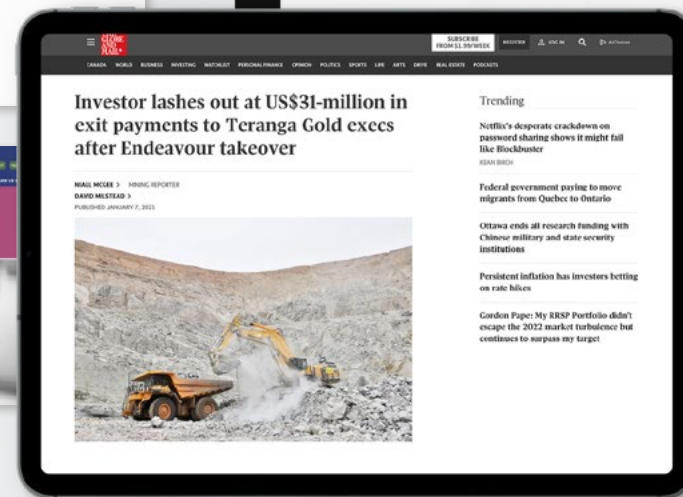
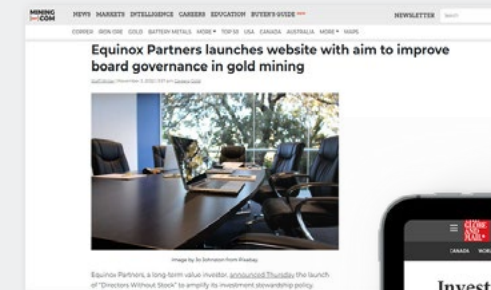
- Establishing Equinox's key messages on the topic of mining M&A and board governance.
- Leveraging Equinox Partner's President and CIO, with journalists in order ensure the firms core messages came across via coverage in key trade media.
- As a complement to media engagement, we drafted and disseminated a press release announcing the launch of Equinox' directors without stock website which acted as a centrepiece to the firms campaign, and as an extension to the firms policy to vote against directors who have served for two or more years but hold less than two years of director's feed in the company stock.

Results

- Over the course of these campaigns, we secured 5 pieces of coverage in key media outlets including Reuters, The Globe and Mail, The Northern Miner, Mining.com, and Mining Journal.
- Prepared the firm with strategic advice as proxy season approached and its governance in mining campaign continued to grow.

Enduring value/changed perception created

- Open discussion with portfolio companies about their board governance and an expectation that real change will be made at the executive/board level.



Management Company

ManCo

Crestbridge: one of the first super-ManCos

ManCo established in Luxembourg in 2010

One of the first businesses to establish an AIFM in early 2014

The only 3rd-party management company in Luxembourg with an EuVECA licence

CRESTBRIDGE



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

Our people. Your value.

WELLS FARGO Asset Management



We've just extended our global fund proposition

Bespoke solutions for fund managers

Network of offices

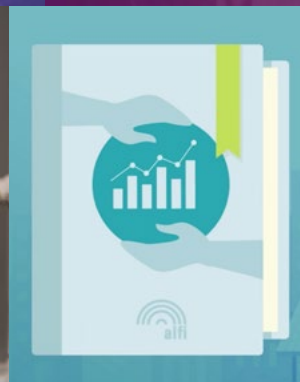
Fund Administration

Regulatory and Governance Solutions

Accounting

New York Cayman Islands London Jersey Luxembourg Bahrain

CRESTBRIDGE

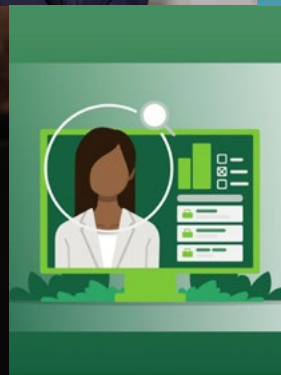


BEST OF BREED

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

NEDGROUP INVESTMENTS

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



THE
ESG
REPORT
2021





2021
Best content targeted to the CSR community
 Corporate Content Awards
 North America



2019, 2018, 2017
Best Marketing & Communications Consultancy
 US Service Awards



2020, 2019, 2018 , 2017, 2016
Best Marketing & Communications Consultancy
 HFM US Hedge Fund Services Awards



2019, 2018, 2017, 2016
Best Marketing & Communications Consultancy
 Hedge Fund Journal Awards



2018, 2017, 2015
Best Marketing & Communications Consultancy
 HFMWeek European Hedge Fund Service Awards



2016
Best Global Marketing & Communications Firm
 HedgeWeek Awards



2015, 2014, 2013, 2012, 2011
Leading Public Relations Firm
 Hedge Fund Journal Awards



2001
Best Financial Communications Campaign
 The Chartered Institute of Public Relations



2019
Outstanding Contribution in Marketing Communications
 Lifetime Achievement Award
 – Anthony Payne



2014, 2013, 2012, 2011, 2010, 2009
Best Public Relations Firm
 HFMWeek European Hedge Fund Service Awards



2016
Best European Marketing & Communications Agency
 HFMWeek European Hedge Fund Service Awards



2015, 2014, 2013, 2012, 2011
Best European Public Relations Firm
 The HedgeWeek Global Awards



2015
Best North American Public Relations Firm
 The HedgeWeek USA Awards



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