

# Investment Opportunity

Project Name: Artemis

Sector: Alternative Fixed Income Product

UK Life Insurance mutual looking for a minimum of £10-20m investment of a total target of £500m for a specific Long Term Asset-backed Fixed Income Product with good return and track record.



## KEY BUSINESS FEATURES

- Well established Life Mutual with <£10bn AUM
- Delivery for many of the UK's major financial services organisations
- 1 in 12 UK households utilise their products
- Top tier customer service verified by Trust Pilot and review sites.
- Ethical investment as its run as a mutual by members for members.

## KEY FINANCIALS

- **Funds Raised:** Have obtained c. £400m funds raised from 2 Pension Funds,
- **Looking to Raise:** Minimum of £10-20m investment. Total target of £500m.

## OPPORTUNITY

- Asset backed Fixed Interest Long Term offering of high risk adjusted yields; decorrelated with other asset classes and whose returns increase with longevity.
- Adjustable returns based on risk appetite – Gross loan rates in the 3%-7% range providing attractive net risk adjusted yields
- Long duration of 15 – 20 years with relatively stable price growth
- Fixed interest alternative to supplement public credit in an investment portfolio, increasing returns without increasing risk.
- Lower sensitivity to interest rates due to stable customer rates less influenced by risk-free rates
- Asset values have remained stable through the COVID 19 pandemic
- Broadly uncorrelated to the business cycle

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In order to obtain the Information Memorandum, please register your interest by completing the Non-Disclosure Agreement and return to: [esthergrove@forsterchase.com](mailto:esthergrove@forsterchase.com).

