



# fundst**talk**-news

Q1 2010

## Recent awards for our investment partners

**BLACKROCK**



**J.P.Morgan**  
Asset Management



Three of our investment partners were recognised at the *Professional Adviser Awards 2010*. These awards are designed to recognise and reward companies that are providing the best products, services and support to financial advisers, and are entirely voted for by advisers.

- Invesco Perpetual won Best Large Fund Group, Best Equity Income Group and were highly commended in the Fixed Income category.
- BlackRock was highly commended in the UK Equity Growth category.
- Schroders was highly commended in the UK Equity Income category.

Meanwhile, BlackRock and J.P. Morgan Asset Management received the Gold Standard for Fund Management at the 2009 Gold Standard Awards in November. These awards aim to identify financial services companies that demonstrate a strong structure and excellent customer-orientated practices. BlackRock has now won a Gold Standard Award three years in a row, while J.P. Morgan has won this award seven years in a row.

Finally, four of our fund links were successful at the 2009 Trustnet Awards in December:

- Fidelity South East Asia Fund won the Asia ex Japan category.
- Schroder Income Maximiser Fund won the UK Equity Income category.
- Schroder UK Alpha Plus Fund was runner-up in the UK All Companies category.
- Invesco Perpetual Corporate Bond Fund was runner-up in the Sterling Corporate Bonds category.

## Newton microsite

**NEWTON**  
The Power of Ideas

Newton has updated its Scottish Widows microsite. You can find a wealth of information about the funds we link to, including brochures, factsheets and webcasts, as well as more general market outlooks. Visit [http://sw.bnymellonam.co.uk/sites/scottish\\_widows/home/home.html](http://sw.bnymellonam.co.uk/sites/scottish_widows/home/home.html)

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## Investment partner seminars

### *Invesco Perpetual Investment Intelligence*

Invesco Perpetual's Q1 Investment Intelligence seminars started in January, and will continue until 11 March. To find out more about dates and locations, visit <http://adviser.invescoperpetual.co.uk/portal/site/ipadviser/investmentintelligence>

### *Schroders' Meet the Managers*

Schroders' Meet the Managers roadshow will be taking place between 2 and 23 March 2010 at various locations around the UK. It includes a chance to hear from Richard Buxton, manager of the SW Schroder UK Alpha Plus Fund and the CMIS UK Focus Fund. For more information, visit [www.schrodersevents.co.uk/mtm2010](http://www.schrodersevents.co.uk/mtm2010)

### *Investment F1orum*

BlackRock and Schroders will be participating in the Investment F1orum on 4 March 2010. To find out more about this, visit [www.investmentf1orum.com](http://www.investmentf1orum.com)

### *The Power of Three*

BlackRock, J.P. Morgan Asset Management and Schroders are holding 12 Power of Three roadshows around the country in April 2010. For more information, email [rsvp@jointroadshows.com](mailto:rsvp@jointroadshows.com)

### *fund5live*

Alastair Mundy, manager of the SW Investec Cautious Managed Fund, will be taking part in six fund5live roadshows in the latter part of February and early March. For more information on venues and to register, visit [www.fund5live.com](http://www.fund5live.com)

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## Investment partner webcasts and teleconferences

### *BlackRock*

Hear BlackRock's outlooks for markets in 2010 at <http://www.blackrock.co.uk/Intermediaries/Multimedia/WebCasts/index.htm>

Remember that Mark Lyttleton, manager of the SW BlackRock UK Dynamic Fund, holds a conference call on the second Tuesday of every month at 11am. And Richard Plackett, manager of the SW BlackRock UK Special Situations Fund, records a monthly update as well as holding a live call at the end of each quarter. For more information, visit <http://www.blackrock.co.uk/Intermediaries/Multimedia/ConferenceCalls/index.htm>

### *Investec*

Listen to an update on the SW Investec Cautious Managed Fund with the manager Alastair Mundy: <http://www.investecassetmanagement.com/united-kingdom/financial-advisers/conference-calls-webcasts/>

### *Fidelity*

Hear 2010 outlooks from Sanjeev Shah, manager of the SW Fidelity Special Situations Fund, Ian Spreadbury, manager of the SW Fidelity MoneyBuilder Income Fund, Trevor Greetham, manager of the SW Fidelity Multi Asset Strategic Fund at <https://www.fidelity.co.uk/adviserproducts/campaigns/2010-outlook/2010-outlook.page?>

### *Jupiter*

Hear from Anthony Nutt, manager of the SW Jupiter Income Fund, on 11 March at 3pm. To register, visit [http://www.jupiteronline.co.uk/IFA/Advisor\\_Support/Webcasts/Webcasts.htm](http://www.jupiteronline.co.uk/IFA/Advisor_Support/Webcasts/Webcasts.htm)



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