

Thesis News



March 2011

Welcome to Thesis News, our brand new bulletin that updates you on the very latest developments and stories from Thesis.

Assets under management break through £3 billion

The Thesis Group now manages in excess of £3.2 billion on behalf of its clients. Some of you will recall that it was only 12 months ago that we broke through the £2 billion mark and strong growth in the collective investment side of our business has seen us put on a further 60% growth over the past year.

Guildford team settles in new office

With what was a surprisingly smooth transition, the Thesis team at Guildford is settling in well to their new offices at 84 North Street.



Complete with the latest facilities, neat storage solutions and pleasant surroundings to welcome clients and professional connections, Kate Nathoo and her team look forward to welcoming visitors to our smart new premises.

Look out for forthcoming events at our new Guildford offices as blessed for the first time with spacious premises, Kate and the team intend to get busy over the coming months hosting our clients and local professional contacts.

Thesis enhances in-house research team

Thesis is pleased to announce the appointments of Matt Hoggarth and Ryan Patterson to a central research team based in the Chichester head office. This is a move that will coordinate and enhance our current research capabilities, both in terms of internal analysis and external communications.

Matt has worked for Thesis for the past 9 years and brings with him a wealth of experience, notably IT skills in the investment arena where he has helped develop a number of special projects for the firm. In addition to the Chartered Institute of Securities and Investment (CISI) diploma qualification, Matt is working towards attainment of the Chartered Financial Analyst (CFA) qualification which is one of the highest regarded qualifications in the industry. He also has a Masters in Advanced International Studies from the University of Vienna, gained from his thesis entitled "Can states go bankrupt?" and the role of the International Monetary Fund (IMF) - a useful experience given recent developments!



Ryan has joined us from investment advisors Cavanagh where latterly he helped this firm develop their own discretionary investment management proposition. In addition to his analytical background, Ryan also has extensive experience on proprietary trading desks and will therefore be working closely with our dealing team. Ryan is also studying for the CFA qualification.

Thesis employees still hungry for exam success

The past couple of months have seen further exam and qualifications success for Thesis' younger generation of staff.

Sam Jackman of our Lymington office passed his second Securities Institute Diploma exam on the subject of Portfolio Construction Theory... and on his birthday as well! While Paul Morley, Portfolio Assistant at our Brighton office was also successful in recently passing part one of the Securities Institute Diploma.

Matt Hoggarth and Kumbi Chilongo both of Chichester both successfully passed stage 1 of the CFA exam at the first time of asking - no mean achievement!

A new look for a new year

Some of you may have noticed some changes to the look of our website and other marketing material in recent weeks. Having completed a brand review with the assistance of Sussex-based agency, Design Distillery, we have refreshed our look in line with revisiting our brand and what it means to be Thesis.

It is well worth visiting our new website which we believe is more user-friendly and a useful source of material and information to support our relationships with financial planners and law firms. The information stored on this website will increase in the coming weeks as we start to bring to life the other aspect of this project which is to improve our external communications.

