

Press Comments

“Brooks Macdonald’s results are remarkable given the banking crisis, severe stock market shakeout, scandals such as Madoff in the wealth management business, and reports of client dissatisfaction with the wealth management arms of big financial firms.”

Source: Investors Chronicle, September 2009

“Private client wealth manager Brooks Macdonald stands out from its peer group as it has actually grown assets under management since equity markets peaked in June 2007.”

Source: Shares, September 2009

“There is...an increased awareness of the fact that smaller independent firms [such as Brooks Macdonald], untarnished by any association with investment banking affiliations will tend to ride-out the current problems affecting the sector to greater effect.”

Source: Wealthnet Article, Winter 2008

“Proved to be one of the most successful...fund managers around...well spread between equities, property and alternative investments.”

Source: Investors Chronicle, March 2007

“The larger London wealth firms are being outperformed by small rivals in terms of producing attractive investment propositions and superior client service.”

Source: Private Banker International, April 2007

Broker Comments

Daniel Stewart & Company

"...BRK is the only investment manager to have grown funds in absolute terms over the period. Indeed, it grew funds by 41% over the period versus -19% at Brewin Dolphin, -16% at Rensburg Sheppards, -20% at Rathbones, -14% at Charles Stanley and a 23% decline in the APCIMS Balanced index."

"...BRK actually stands to benefit from the RDR, because smaller introducers will be more likely to need to enter partnerships with larger players because of the increased cost implications of regulatory change."

Fox-Pitt Kelton

"...the investment management division has shown itself to be more lithe than most of its peers in exiting equities, repositioning for the recovery and delivering better performance. The performance of the discretionary portfolios in our view is going to stand out in its market and help to win new business for the group."

"The group continues to make its continued investment into research and its asset allocation process core to the exceptional delivery on performance criteria."

"The group seeks to achieve higher than average returns than the private client investment management industry by diversification in all asset classes. Part of the distinctiveness of the offer comes from providing access to a wide range of product options and scope to all asset classes."

"Brooks Macdonald's policy of rebating commissions to clients removes the benefit of churn to the group and reduces the potential regulatory risk."

"The management's high level of focus on training and competence demonstrates that the group is aware of the key business constraint of having experienced qualified advisers."

Collins Stewart

"Brooks Macdonald: Absolutely (and relatively) Fabulous"

"FUM showed growth (all organic) of 17% y-o-y, compared to a 22.5% fall in the FTSE100. This is being driven by a combination of fund performance and capturing market share, particularly in the SIPP market."