## What is a POD?

PureGroup's Pure Overview Document; an innovative document providing your clients with a clearer overview of an investment product that simplifies traditional historical information and provides new forecasting data to support investor engagement.

Why have you created the POD?

We believe that traditional methods for providing information on funds have lost their way as an engagement tool. They are often too complex, use industry jargon and present too much information, limiting client understanding and engagement.

The POD is designed to create a standardised and consistent information document across all investment products; open, closed and exchange traded. Our analysis places investments in the context of their peers and wider business cycles.
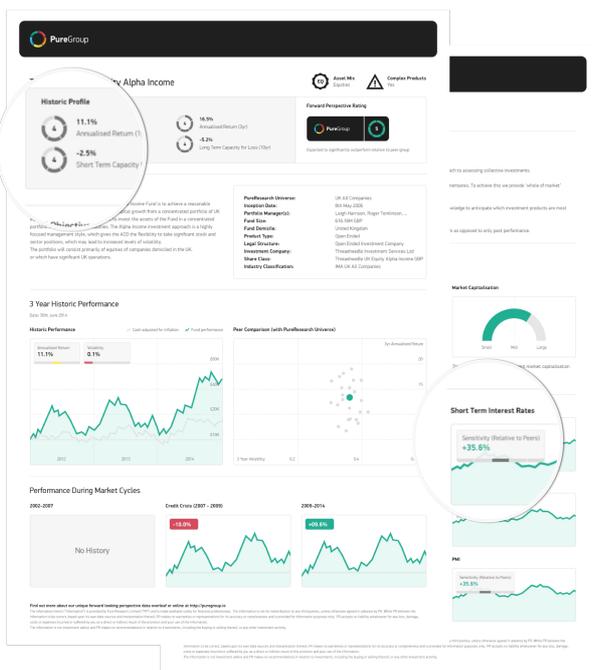
Why does the POD not contain certain information the industry is accustomed to seeing?

We wanted to focus on innovation and find new ways to present analysis it in a manner which is both engaging and supports understanding.

What is unique about the POD?

- It contains the *PureGroup Forward Perspective Rating*, our objective view on an investment's relative performance over the next 12 months.

- Provides a quick view of important data points, such as capacity for loss and historic return.

- All numbers are displayed in context of their peer group, i.e. quintiles to illustrate best and worst performers vs their peers.

- Performance is shown against cash adjusted for inflation. This is the "real" benchmark for investors.

- To encourage longer term thinking and to reinforce product suitability, we show performance over different economic cycles. A point in time comparison.

- Our unique macro-economic factor sensitivities enable investors to relate the performance of an investment to *'real'* life metrics that are readily understandable - such as the impact of an interest rate increase, or a decrease in inflation.

Why are Macro-economic factors important?

In increasingly turbulent global markets, macro-economic factors have been proven to impact the performance of asset classes.

Using empirically tested modelling and forecasting techniques, it is possible to provide understanding on how these changes will impact investments.

We use forward-looking factor measures to compliment traditional retrospective analytic methods.

How have you created forecasting models?

PureGroup have partnered with Parala Capital and leading US based academics, Allan Timmermann and Russ Wermers who have significant expertise in the fields of economic modelling and investment performance analysis.

Contact us: **info@puregroup.io**