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Collidr surpasses £3 Billion in AUM on latest client wins

- **Paradigm Norton one of the recent firms to adopt IntelligentMPS for their discretionary MPS offering**
- **Upcoming launch of new portfolio oversight technology will allow advisers to benefit from enhanced AI tools and portfolio analytics for free**

Collidr, the AI-driven discretionary investment manager, has surpassed £3 Billion in AUM with their IntelligentMPS solution. This MPS service, which can build either easy-to-implement, tailored, or fully customisable, white-labelled portfolios, is offered to end investors exclusively through adviser firms where the trend towards custom MPS is growing rapidly.

As part of the collaboration, Paradigm have partnered with Collidr on Paradigm's advisory, risk-range model portfolios, including accumulation, income and responsible options, which Collidr will manage using their proprietary technology and 'Quantimental' investment approach. This approach combines Collidr's team of experienced institutional fund managers with behavioural research and AI-driven technology to ensure that investments are suitable for each portfolio.

Symon Stickney, CEO of Collidr, says: "We're delighted to partner with a strong brand and firm such as Paradigm Norton. We each bring unique and complimentary skills to the table – that means Paradigm Norton's advisers are able to deliver to their clients enhanced risk management and governance, and transparent reporting."

David Burrige, Investment Committee Chair of Paradigm Norton, added "We onboarded with Collidr in 2023 and nearly a year in, it has been a great experience. We really liked how Collidr offer only bespoke MPS. They really are helping us to be a better version of ourselves. Collidr were always keen to listen to what was important to us and were flexible in how they can best help, looking for the opportunities to add value. For example, they have helped us secure institutional pricing terms on some of our funds, helped with articulating market news and updates to our investment focused clients and assisted with consumer duty requirements.

In short, overlaying Collidr's expertise, oversight and DFM permissions, with our in-house capabilities and philosophy has provided a market leading solution for investors who are looking for low-cost, evidence-based portfolios and responsible solutions."

According to David, Paradigm Norton partnered with Collidr on this service for three key reasons:

1. Collidr's ability to understand our current investment proposition and build a bespoke discretionary service model to meet these unique requirements and objectives.

2. Its institutional approach to sustainability and long term partnerships that support advisory firms in delivering these solutions.
3. Its market-leading risk management and interactive reporting capability, which allows IFAs to spend more time with clients. This is particularly important in light of the FCA's Consumer Duty which has sharply increased the compliance burden on adviser firms.

Symon Stickney added, "We will continue to see rising demand for all forms of MPS offerings over the coming years, from easy-to-implement 'select' portfolios to fully bespoke MPS solutions, which deliver the investment proposition advisers are looking for."

"Adviser firms focus on using technology to benefit their businesses has never been greater. Collidr will be launching a new AI-driven, portfolio management and reporting platform to help advisers further automate and address the need for better portfolio oversight, risk management and personalised reporting, which will help them improve productivity and enhance the overall client experience," said Symon Stickney.

ENDS

About Paradigm Norton

People, planet, profit. Paradigm Norton is where financial planning is about your life, not just your money. Founded in 2001, Paradigm Norton has one clear aim: To impact the lives of our clients, our community and our team for the better, for ever.

Paradigm Norton is one of the largest independent financial planning companies in England, serving more than 1,000 clients with over £1.39 billion of assets under our management and employing over 85 people across four offices: Bristol, London, Exeter and Torquay. Being employee owned means we're free to make impartial recommendations and we're structured into teams that each service a small number of clients.

About Collidr

Launched in 2010, Collidr's operations include an investment management firm, Collidr Asset Management Limited, which is authorised and regulated by the Financial Conduct Authority and uses Collidr's proprietary AI technology, and Collidr Technologies Limited, which offers this technology on a stand-alone basis, in addition to research services, empowering investors to make better investment decisions and digitalise the investment process.

Collidr believes every investor would benefit from a disciplined, systematic approach to managing their investments, one that leverages intelligence-led technology every step of the way.

Partnering with trusted advisers, Collidr's technology and services are available to: Financial Advisors, Wealth Managers, Actuarial Consultants, Private Banks, Life Companies, Pension Scheme Advisors / Providers, Asset Managers, Discretionary managers, Family Offices.

Collidr technology powers global client assets of c£8+ billion.