



# Best Customised Investment Management Firm 2017 & Award for Excellence in Emerging Manager Strategies - USA

**FIS Group is an investment management firm that provides customized manager of investment solutions for institutional investors. We invited Tina Byles Williams, CEO and CIO, to tell us more about the firm.**

With offices in Philadelphia, Chicago, and San Francisco and assets under management of \$4.7 billion, FIS Group draws on its vast industry experience to offer the very best investment solutions for institutional clients. Tina outlines how the firm was created in order to make a difference in the market and how it has worked to achieved this.

"FIS Group was formed to act as a catalyst for positive change in our industry. We constantly ask ourselves are we being transformative and are we pushing the needle. As a fund-of-funds, we saw an opportunity in identifying entrepreneurial firms that were small but talented and arraying these high performing managers into investor portfolios. We source boutique firms globally and help them build an institutional infrastructure that they would not have otherwise in light of many development challenges in the asset management industry.

"For 20 years, we have delivered risk-adjusted returns by conquering the complexity of identifying high skill, high active share entrepreneurial managers that have gone largely undiscovered by the institutional investor community. Unique among our peers, FIS Group enhances risk-adjusted returns by using macro strategy insights to allocate capital among the managers and/or through a global macro tactical completion strategy. Our culture is a fusion of relentless curiosity and a scientific,

disciplined process.

"Fundamentally, we created the FIS Group Ecosystem to provide access to working capital and discounted access to critical infrastructure resources such as: accounting, legal, compliance, back office and auditing services, as well as marketing support and trading platforms. Through the FIS Group Ecosystem, managers can receive discounts up to 60% on the services they need to run their business and connect with angel investors who seek to provide working capital to small firms."

Offering the very highest standards of client service is crucial to ensuring the ongoing success of the firm, and as such Tina is keen to emphasise her firm's focus on supporting clients and ensuring that their needs are both understood and met.

"At FIS Group, we believe that timely, accurate responses to client requests are only the beginning of establishing lasting professional partnerships with our investors. As part of this collaborative approach we place a priority on asking our clients about their full scope of needs and challenges. We listen for ways we can add value, even if it is not with a direct solution sold by our firm. We also share our internally generated research when we see that it may have an application for a client's needs."

Looking ahead, Tina is excited for the future, which she believes will be shaped by technology as digitalisation changes the shape of



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the whole corporate landscape.

"The investment industry is being disrupted, as other industries are, by technology and automation. Clients are extremely sensitive to costs and are under acute pressure to find attractive risk adjusted returns for the long term. We believe that there are two ways for investment managers to add value in this brave new world: one, as a provider of low cost, largely passive products and two, as a provider of active strategies, characterized by high active share and differentiated positive alpha. We see ourselves firmly in the second group; we launched our international small cap and frontier markets strategies in 2013 and our new product development is focused on other strategies in capacity constrained areas that reward active management.

"Overall, there is institutional demand for fintech solutions that will enable or enhance clients' ability to manage internal investment, research and operational functions. We are also beta testing such a solution internally and hope to bring it to market in mid to late 2018, and we look forward to taking advantage of the opportunities these developments will bring for our company."

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