HEIDI BRYANT

BMO Global Asset Management.

"Performance with style" — a multi-channel launch for the Global Equity Market Neutral Fund.

A 2015–2016 engagement with BMO Global Asset Management (UK / European) — the post-rebrand business formed when BMO acquired F&C Investments in May 2014. The brief: launch a UCITS SICAV version of a long-standing systematic equity strategy into the UK and European intermediary market, around the strategy's five investment factors, through a regulatory frame that spanned multiple jurisdictions.

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CASE STUDY · ASSET MANAGEMENT · UCITS FUND LAUNCH

Five factors. One repeatable story.

A launch campaign for the BMO Global Equity Market Neutral Fund — UK and European intermediary market — 2015 to 2016.

THE CHALLENGE

BMO Global Asset Management — recently rebranded from F&C Investments following BMO's May 2014 acquisition of the F&C business — was launching a UCITS SICAV version of its Global Equity Market Neutral Fund into the UK and European intermediary market. The strategy itself was not new: the Oeic predecessor, the F&C Global Equity Market Neutral Fund, had grown to over £200M before the SICAV vehicle was structured for a broader European audience. What was new was the brand wrapper, the regulatory frame, and the audience.

The brief was to introduce the SICAV to a wider European adviser audience under the new BMO brand; to do it around the strategy's five investment factors as the core messaging architecture; and to do it inside a compliance frame that respected both the new parent's standards and the regulatory environment of every country it sold into. With a target of 4.5% gross annual return above cash and a target volatility of 6%, the fund was a serious institutional product — but it needed marketing that an intermediary buyer could hold up against any of the louder, more glamorous-sounding alternatives in the absolute-return category.

WHAT I DID

Led the marketing campaign end-to-end, working closely with Erik Rubingh (Head of Systematic Equities and lead manager on the fund), Chris Childs (co-manager) and Rob Thorpe's UK and European intermediary sales team.

Built the campaign architecture around the five investment factors — value, momentum, low volatility, size and growth-at-a-reasonable-price (GARP) — as the central message, branded for the adviser audience as the strategy's "True styles". One repeatable story, carried into every channel and every conversation.

Co-developed the creative concept with the BMO in-house design team and my copywriter — "Performance with style", with classical ballet dancers as the metaphor for the disciplined, choreographed nature of multi-factor systematic investing. The line itself was developed jointly between me and the copywriter; the ballerina-led visual concept was built out alongside the in-house design team. The idea did the work the five factors couldn't do on their own: it made a quantitative strategy emotionally legible to an adviser audience without compromising the methodology. Visually, the campaign sat at the front of where financial services design was going in 2015 — not where it was coming from.

From there, a full multi-channel rollout. The web hub anchored the programme for advisers who wanted to dig deeper into the methodology and Erik Rubingh's systematic-equities track record. The brochures became the sales toolkit for Rob Thorpe's UK and European intermediary team — designed to be carried into adviser meetings, not handed out and forgotten. Outdoor display ran at Luxembourg Airport — a deliberate, audience-precise placement: Luxembourg is the European fund domicile capital, so Continental fund selectors and asset management professionals were walking through the same departure hall as the campaign. The same creative carried through in regional adaptations — including the Italian "Performance con stile" — for distribution into individual European markets. Print and online advertising reinforced the same five-factor / True styles story in the trade publications IFAs and wealth managers actually read.

SELECTED PRESS PLACEMENTS

Citywire Wealth Manager	"BMO unveils global equity market neutral fund" — SICAV launch announcement

Investment Europe	"BMO launches market neutral equity fund" — European intermediary press
Investment Week	"BMO GAM expands absolute return range with long/short fund"
FINalternatives	"BMO Global Asset Management Expands Equity Market Neutral Fund Family"
Bestinvest	Fund factsheet hosted for adviser due-diligence audiences

WHAT WAS NEW ABOUT IT

Four things that the launch programme would not have been complete without:

- A creative concept distinctive for financial services at the time — premium, graceful, visual — co-developed with the in-house design team and my copywriter, at a moment when most of the category was still defaulting to charts and stock photography.
- A single messaging architecture — the five investment factors branded as "True styles" — that the sales team could carry into adviser conversations without paraphrasing it into nonsense.
- A design system engineered for compliance from the start — every format built to clear the regulatory frame on the first read, across multiple European markets, rather than be rescued from it at the end of the process.
- An audience-precise outdoor placement at Luxembourg Airport — outdoor advertising that reached the people the SICAV was being sold to, not just the most people. The kind of media buy that respects who the buyer actually is.

RESULT

A coherent multi-channel launch for the SICAV vehicle across the UK and European intermediary market, with the same five-factor story landing consistently in every channel and every conversation. The sales team had a brand-consistent toolkit; advisers had a clear, methodology-honest version of the fund to evaluate; the trade press had a sharp story to write up.

The campaign cleared compliance without rewrites — the regulatory frame was built into the design and the message from day one rather than retrofitted at the end of the process. By the time the SICAV was in market, the five-factor story had taken root in the conversations that mattered: with advisers, with the trade press, and inside the firm.

ENGAGEMENT

Sector	Financial services · asset management
Firm	BMO Global Asset Management (UK / European) — formed from BMO’s May 2014 acquisition of F&C Investments
Period	2015 — 2016
Audience	UK and European intermediary — IFAs, wealth managers, multi-asset platforms
Fund	BMO Global Equity Market Neutral Fund (UCITS SICAV), part of the True Styles series
Five factors	Value · momentum · low volatility · size · growth-at-a-reasonable-price (GARP)

Fund target	4.5% gross annual return above cash, 6% target volatility
Manager	Erik Rubingh, Head of Systematic Equities
Co-manager	Chris Childs
Sales sponsor	Rob Thorpe — UK and European intermediary distribution
Creative concept	"Performance with style" — co-developed with the BMO in-house design team and my copywriter
Outdoor placement	Luxembourg Airport — European fund domicile capital
Language adaptations	English · Italian ("Performance con stile")
Channels	Web · brochures · outdoor display · print and online advertising

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