

Case Study

Polar Capital

Polar Capital is a specialist fund manager. The firm offers a range of investment trusts and funds – and needs design and print partners who can deliver high-quality reports to tight timescales.

Pre-pandemic, for the firm's Investment Trusts, Tracey Lago ran a tender exercise for the production of their annual reports. Of the four providers considered, Perivan were chosen; Tracey had worked with the company in a previous role and knew that they not only had the technical ability to fulfil the task, they had the softer skills and 24/7 support essential in a fast-turnaround industry.

Today, Perivan design and print three annual reports for Polar Capital.

A tailored approach

While all three reports are for independent investment trusts; two of them are designed to a tight branding brief, and Perivan are not needed to design them fully, the team is however invaluable in tweaking and making the existing design work.

The third one is a far bigger project, with a proactive fund manager who has clear ideas about the theme of each report. A lot of thought goes into the imagery and messaging – which Perivan then help bring to life.

A fund manager with a strong vision and ideas has the potential to bring design challenges – but by taking an honest and transparent approach, the Perivan team has "really stepped up", in Tracey's words, to the challenge. Ideas around the report's themes can evolve rapidly – and the design team takes it in their stride.

Producing materials for Polar's suite of independent investment trusts means some specific requirements – reports need to be from the same family, but look sufficiently distinctive that it's clear they are different documents for different companies.

Perivan have proved adept at meeting brand requirements and the Polar marketing team's brief, while ensuring that the report design is sufficiently unique and compelling for investors and other stakeholders.

Dealing with the unexpected

Sitting in a room with the fund manager and understanding his ideas is key to success for the process – so when Covid-19 led to lockdown, remote working could have thrown a spanner in the works. Instead, the Perivan team adapted swiftly to remote working, delivering the same consistent service as usual, and ensuring the report achieved the expected high standards and tight timescales.

Similarly, when production on another report had to be paused due to a corporate action, and then significantly edited as a result, the Perivan team took it in their stride, taking a flexible approach and accommodating the changes both in brief and timings.

Owning the task

In the world of listed fund reporting, timescales are tight – although deadlines may move! This combination requires a focus and agility that Perivan delivers, with a highly-responsive team – as Tracey says, they are proactive at "owning the task", being not just "incredibly responsive" but accurate – a must-have in complex financial reporting.

 **The Perivan team are adept at interpreting our ideas and working with us to, where necessary, stretch – while still complying with – our brand guidelines. As a result, we get the best from our brand for our fund managers and our clients.**

Perivan's skilled designers, expert print teams and customer-focused approach enable us to produce highly-professional reports to tight deadlines. They always find solutions to the challenges we present them with (which are many!) – and are great people to work with. 

Tracey Lago

Head of Investment Trusts – Secretariat, Polar Capital

Please get in touch with us via
email at hello@perivan.com or
call us on +44 (0)20 7562 2200

