



**Imperial College Union
Finance and Risk Committee**

Thursday 21 March 2019

AGENDA ITEM NO.	16
TITLE	Investment Performance
AUTHOR	Malcolm Martin
EXECUTIVE SUMMARY	<p>The Union engaged in a robust procurement process during the latter part of 2017/18 which culminated in the appointment of Rathbones Investment Management Limited as our investment partner to manage our cash surplus.</p> <p>An investment of £1.5m was lodged during August 2018.</p> <p>Victoria Hoskins, Investment Director will be attending to provide a performance analysis of our portfolio.</p> <p><i><u>It will be assumed that Committee members have read the two attached documents</u></i></p>
PURPOSE	<p>The presentation gives the opportunity for the Board to understand how our portfolio is being performing especially given its ethical overlay.</p> <p>To provide assurance that charitable funds are being safe guarded against the impact of inflation.</p>
DECISION/ACTION REQUIRED	For discussion