

Fund groups join forces to improve understanding of ETFs

11th May 2016: A number of the UK's leading exchange traded product providers today announce the launch of the ETF Forum, an independent partnership designed to help improve the adviser community's collective understanding of ETFs.

Founded by exchange traded product (ETP) issuers BMO Global Asset Management, ETF Securities, Source (in association with Legal & General Investment Management) and WisdomTree Europe, the ETF Forum is committed to promoting awareness of ETFs and educating the adviser and wealth management market on how to better use ETFs.

Covering the entire ETP market, the ETF Forum's main goal is to educate intermediaries on how the products can be used as effective investment tools to build or enhance well-diversified portfolios.

As part of this education programme, the ETF Forum is hosting a series of free CPD-accredited workshops across the UK over the course of the year.

These events will feature leading speakers from the ETF industry discussing a wide variety of topics including the key characteristics of ETPs, why and how ETFs are traded, and how best to access them.

The ETF Forum's launch event is in London on 20th June at BMO's offices, followed by ten further workshops held in cities across the UK including Glasgow, Edinburgh, Manchester, Birmingham and Bristol.

Nizam Hamid, head of ETF Strategy at WisdomTree Europe, said the collaboration of so many ETF providers was an industry first. "This coming together of some of the UK's leading ETP providers is a milestone for the industry," he said.

"ETFs are becoming increasingly popular but given the huge variety of products available, it is imperative advisers and wealth managers know how they can best use them. The ETF Forum will help ensure they have the most up-to-date information about ETFs when deciding where and how to allocate clients' assets."

Rob Thorpe, head of UK intermediary at BMO Global Asset Management, added: "ETFs are seeing increasing inflows, however there remains a knowledge gap amongst UK advisers and wealth managers. The ETF Forum has been set up to fill that gap and drive an increase in ETP adoption amongst the UK adviser community'.

Discussing the future for ETFs, Frank Spiteri, managing director and head of distribution at ETF Securities, said: "The ETF landscape is ever-changing, with product innovation coming through constantly."

Dominic Clabby, director and head of UK retail at Source added: "In this environment it can be hard for professional investors to stay at the forefront of developments within the industry, but via the ETF Forum we can help them get the most out of these products."

As well as the series of roadshows, the ETF Forum has also launched a dedicated website to provide ongoing information to advisers, which can be found at www.theetfforum.com

Ends

About BMO Global Asset Management

BMO Global Asset Management is the fastest growing and the second largest provider of ETFs in Canada. It has a strong and growing presence in Europe, having purchased F&C Asset Management in July 2014. It is focussed on providing clients with best in class products and solutions that meet their existing needs by drawing on its worldwide capabilities across a range of asset classes. In the UK, BMO Global Asset Management recently introduced 5 new equity ETFs focused on generating high quality income and 4 new corporate bond ETFs to help investors diversify their exposure to global investment grade corporate bonds and high yield bonds. BMO ETFs are listed on the London Stock Exchange and may be purchased and sold on the exchange through a broker-dealer.

About ETF Securities

ETF Securities is one of the world's leading innovators of Exchange Traded Products (ETPs) and provides specialist investment solutions across multiple asset classes to investors around the world, enabling them to build and diversify their portfolios intelligently.

We are pioneers, having developed the world's first gold ETP. Today we offer one of the most innovative ranges of ETPs covering commodities, FX, equities and fixed income. Using our pioneering spirit, unrivalled expertise and by working with leading third parties, we seek out the most compelling investment opportunities and make them accessible to investors as *the intelligent alternative*.

About WisdomTree

WisdomTree Investments, Inc., through its subsidiaries in the U.S. and Europe, including WisdomTree Europe Ltd based in London, is an exchange-traded fund ("ETF") and exchange-traded product ("ETP") sponsor and asset manager. WisdomTree launched its first ETFs in the United States in June of 2006 and in Europe in October of 2014. A smart beta innovator, WisdomTree pioneered the concepts of fundamentally weighted indexes and active ETFs—and is currently an industry leader in both categories. WisdomTree offers products covering equities, fixed income, currencies, commodities and alternative strategies. Through WisdomTree Europe Ltd, it sponsors WisdomTree UCITS ETFs and BOOST short and leverage ETPs.

About Source

Source offers investors innovative Exchange Traded Fund (ETF) solutions and is one of the largest ETF providers in Europe. Being independent allows Source to collaborate with leading investment partners, such as Legal & General Investment Management, to create ETFs with differentiated strategies. Source's product range also includes basic portfolio building block ETFs across a variety of asset classes.

Legal & General Investment Management (LGIM) is one of Europe's largest asset managers and also one of the world's leading providers of index fund management. LGIM works with a wide range of global clients, including pension schemes, sovereign wealth funds, fund distributors and retail investors.