



CORPORATE FINANCE *Awards 2024*

Winners Brochure

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Overview

The inaugural Corporate Finance Awards were held virtually on 18 September 2024 to celebrate the outstanding financial performance of the UK's middle and larger sized companies.

UK corporates must navigate their way through numerous financial areas including accounting taxation, structuring, investment decisions and cash management, to ride the waves of the economic environment, and the awards are there to acknowledge those firms that have excelled in these fields.

The awards also recognised the supplier organisations that support corporate finance, including private equity and accountancy firms, banks, asset managers, and tech and other key providers.

We would like to take this opportunity to thank all the firms that entered the awards, and we look forward to welcoming you back for the Corporate Finance Awards 2025.

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The winners

Asset Manager of the Year

WINNER: Royal London Asset Management

Private Equity Firm of the Year

WINNER: Capital Dynamics

Investment Strategy of the Year

WINNER: Pluto Finance

Sustainable Investment Strategy of the Year

WINNER: Finance Earth

Accountancy Firm of the Year

WINNER: PK Group

Technology Provider of the Year

WINNER: SmartSearch

Business Lender of the Year

WINNER: Rivers Leasing

M&A Deal of the Year

WINNER: William Blair

Debt Team of the Year

WINNER: PayPlan

Best Use of AI

WINNER: Cirrus

Diversity Initiative of the Year

WINNER: Moody's

Marketing Campaign of the Year

WINNER: NOW: Pensions

Innovation Award

WINNER: Fair for You CIC

Corporate Finance Team of the Year

WINNER: Transport for London

HIGHLY COMMENDED:

Technology Provider of the Year

HIGHLY COMMENDED: Acre

Innovation Award

HIGHLY COMMENDED: Bluestone



Asset Manager of the Year: Royal London Asset Management

To qualify for this award, the judges were looking for asset management firms with strong performance data against fund benchmarks, and one which can demonstrate high levels of innovation in dealing with UK corporates.

The winner was Royal London Asset Management, after the judges said it presented outstanding financial performance and business innovation, demonstrating that it is a real leader in this sector. Royal London Asset Management is one of the UK's leading investment companies, investing across all major asset classes.

As of the end of September 2024, Royal London Asset Management managed over £170bn of assets, split between equities, fixed interest, multi-asset investing, property and cash. It also has a market leading capability in sustainable investing.

Across its product range, Royal London Asset Management provides funds and segregated accounts investing in Government bonds, investment grade, high yield and unrated credit, equity income and equity growth.

Despite a challenging year for investors in 2023, with increased geopolitical tensions and rising inflation and interest rates, Royal London Asset Management provided a strong and consistent performance, with more clients asking about its approach to stewardship and ESG.

Analysing and assessing ESG issues across investment strategies helped the firm to better manage its investment risks and opportunities, including principal adverse impacts (PAIs) where applicable.

The asset manager believes companies that are best prepared for a more sustainable future are more likely to deliver long-term returns for clients, meaning that each investment team at Royal London Asset Management is responsible for considering relevant ESG risks and PAIs in their respective investment processes.



These ESG risks are also built into its active investment decisions, according to individual fund objectives, tailoring the approach to consider the nuances of the assets that it manages in order to improve standards, reduce risk and help enhance returns.

Royal London Asset Management has outlined its commitment to being a responsible investor, which is reflected in the way it engages with companies that it invests in.

In the last year, Royal London Asset Management has put significant focus on its net-zero engagement, identifying the top emitting companies across its managed assets, putting them through a rigorous evaluation, and then engaging to align their business models with net-zero.

Royal London Asset Management has also worked with several clients and other asset owners in the past couple of years to review and update its investor expectations around Russian cybersecurity threats, which have increased since sanctions were imposed in 2022. Royal London Asset Management continues to refine its approach in this area to further demonstrate that it is an investment manager reflecting the latest best practices and standards.

We would like to take this opportunity to congratulate Royal London Asset Management on winning this award

For more information on Royal London Asset Management visit www.rlam.com

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It's how we deliver **asset management excellence** with
a longer-term perspective at Royal London Asset Management.

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Left: Alexandra, Head of Client Services

Right: Adam, Business Development Manager

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Investment Strategy of the Year: Pluto Finance

The Investment Strategy of the Year looks to reward the firm that has implemented an investment strategy setting the standards for the industry to follow.

Although creating absolute returns was a measure of success, the judges were also looking to see how the strategy aligns with company objectives.

Pluto Finance was named the winner in this category after the judges were impressed with how the firm has addressed the housing crisis with innovative real estate private debt solutions for institutional investors.

A real estate private credit platform specialising in the UK residential sector, Pluto was established in 2011 and, to date, has advanced over £3bn across 271 bridging, development and investment loans.

Pluto lending vehicles are funded by institutional investors, including pension funds, insurers and global asset managers. As the longstanding private credit provider in this specialist sector, the company is known by borrowers for its ability to structure loans bespoke to borrower needs and as a result, repeat borrowers represent more than 65% of Pluto's new lending activity.

As a business, Pluto offers a unique platform for institutional capital to deliver specialist finance to SME housebuilders. These investment opportunities, often too small to be significant individually, are expertly sourced and managed through the company's deep and respected origination network and forensic credit expertise.

The judges were quick to praise Pluto for its innovative solutions to make a real impact. The company harnesses the power of patient capital to create genuine societal benefits, while at the same time delivering strong investor returns. Much of the group's focus is on asset creation, finding investment opportunities, and supporting the project delivery.

It is this unique strategy that allows investors to tailor a bespoke approach to investing in real estate debt, while



maintaining a diversified portfolio of investments. Investors can also invest in a sleeve alongside the Pluto's flagship fund, with the comfort that their investments are not being diluted in any way, gaining them national diversification and exposure, while simultaneously driving returns in their specified remit.

Pluto also isn't just about funding projects, but creating value through rigorous due diligence, expert management, and continuous oversight. This holistic approach ensures the firm can continue to deliver strong returns while making a meaningful impact with its delivery of affordable housing.

As a further testament to the success of its investment strategy, Pluto was approached by Universities Superannuation Scheme, who liked what they saw so much that they took a large minority shareholding in Pluto, as well as investing in its flagship lending vehicle.

This, alongside the judges' recognition of the firm's efforts, are true indicators of Pluto's expertise and commitment to driving societal change.

We send our congratulations to Pluto for showcasing an outstanding and innovative investment strategy.

Empowering Local Communities with Private Real Estate Debt



Lending since

2011



£3bn

Lent
to date



£11bn

Average
facility size



10,000+

Homes
financed

About Pluto Finance

market leading access | stable secured returns | local affordable opportunities

Pluto Finance is a real estate private credit platform, specialising in senior lending on predominantly residential assets in the UK. Since its inception in 2011, the company has provided over £3bn of lending across bridging and development finance, funding the delivery of over 10,000 new homes. Pluto Finance is part-owned by the Universities Superannuation Scheme, the UK's largest private sector pension scheme.



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Private Equity Firm of the Year: Capital Dynamics

When the judges were choosing the winner for this award, they were looking for firms with strong levels of deal activity that also play a part in the wider merger and acquisition ecosystem.

For presenting an “outstanding portfolio construction, quantitative monitoring and risk management capabilities”, Capital Dynamics was awarded the title of Private Equity Firm of the Year.

The global asset management firm works across private assets, including primaries, secondaries and co-investments, and clean energy.

The firm has more than \$14bn in assets under management and advisement across 13 offices in Europe, North America and Asia.

Capital Dynamics boasts a global client base, which includes over 800 institutional and over 650 private clients, and has a long history of advising clients on new products, portfolio construction and downside protection.

Across its portfolio, the global primaries team invests in mid-market managers, where there is opportunity to create value through operational enhancement rather than financial engineering.

Its secondaries strategy focuses on smaller transactions where market inefficiencies persist and supply-demand dynamics benefit experienced buyers, while its co-investment strategy focuses on investing directly in private mid-market companies where there is less competition, better pricing and enhanced exit opportunities compared to large buy-outs.

Since the early 1990s, Capital Dynamics has worked with a number of private equity separate managed accounts with institutional investors, some of which are still active today.

The firm has also launched tailored intelligent portfolio construction programs that are designed for like-minded groups of investors who want to maintain private equity



asset class exposure over time. This includes its LGPS program, which launches tailored vehicles to allow UK-based LPs to meet their investment demands.

The firm prides itself on robust and timely communications with clients, especially during periods of adversity.

Over the past year, Capital Dynamics has hosted a number of webinars for both existing and prospective investors across the globe, covering its of its private asset strategies.

Furthermore, its risk management team monitors all risks within its funds and separately managed accounts and reports to the risk committee, usually providing risk reporting for certain institutional clients, including pension funds, on a regular basis, including each time a risk materialises.

In line with this experience in the private assets industry, Capital Dynamics has developed a set of tools and models to analyse large historical and current data.

It also boasts a proprietary set of analytical tools called Pharos, which were developed in house to assist clients in its quantitative analysis of their private asset portfolios.

We would like to congratulate Capital Dynamics on this award.

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Deadline for entries:

24 January 2025

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