

**This month: February 2016**

Helping you maximise the effectiveness of your financial planning

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## An effective way into private equity

Private equity managers spend an inordinate amount of time in carefully selecting which businesses they will invest in and undertake detailed research and analysis before making their move.



## Benefit from thorough research

Private Equity Managers have a wide range of potential target prospects, which could include start up private companies, divisions of larger corporations that have become neglected and requiring new, fresher management, or additional investment for expansion, or even privatised currently listed companies that have become shackled by the market's or shareholders requirements. They are, therefore, understandably reluctant to allow their individual retail investors to join their party with funds of less than £1 million.



Many of these carefully selected investments are held by the managers for 4 or 5 years, and sometimes much longer, giving them time to implement the correct strategy to maximise their eventual return. However, their ultimate aim is always to exit the investment at a substantial profit.

However, it is not necessary to commit in excess of £1 million to take advantage of the private equity business opportunities. Listed private equity companies allow the retail investor to access this private equity model with much more modest amounts. This can be achieved by investing through the markets in either a listed direct investment fund or even a fund of funds. The former invests in individual portfolio companies that, when combined, create a portfolio of directly held private equity investments. The latter invest in funds that themselves invest in individual companies, so in fact they are investing in the expertise of those fund managers, rather than individual companies.

If you would like to discuss any of these issues in greater detail, please do not hesitate to contact us.

If you would like us to help you solve financial problems, or to assist with financial planning, contact us on 0118 932 0600 or e-mail: [twyford@osceola.co.uk](mailto:twyford@osceola.co.uk) \*If you wish to be removed from future mailings, please reply to this email with the word 'Unsubscribe' in the subject.