



FE Investments selects technology vendor Jacobi to accelerate growth of its Managed Portfolio Service (MPS)

London 13 February 2025

FE Investments (FEI) has selected technology vendor Jacobi Strategies (Jacobi) to enhance the discretionary fund manager's model portfolio capabilities.

Jacobi's institutional-grade investment technology will be used to amplify and industrialise FEI's model portfolio risk monitoring, forward-looking analytics and model portfolio design processes.

As part of their usage of Jacobi, FEI will integrate a range of proprietary models, tools and processes into their own private version of the software.

As one of the top 10 MPS managers by assets, FEI will also strengthen their model portfolio reporting and engagement capabilities, reinforcing their commitment to best-in-class client service.

Rob Gleeson, Chief Investment Officer at FE Investments (FE Fund Info), says:

"We're very excited to be adding Jacobi to our tech stack. As a subsidiary of a global data and software firm we are very process driven and the ability to automate even the most sophisticated processes has been a large part of why we made our choice. With cost pressures continually increasing, efficiency at scale has become our biggest need. With this new system we are confident we will be able to offer a wider range of investment services to more clients than ever."

Curtis Evans, Managing Director at Jacobi EMEA says:

"We are delighted to have partnered with one of the leading providers of Managed Portfolio Services in the UK. In this highly competitive market, our technology can play a key role in FEI's next stage of growth."

"We continue to see strong demand for our model portfolio technology as wealth managers look to scale their investment processes and enhance the quality of engagement with clients. Jacobi has a global footprint and we have a strong commitment to UK wealth and asset management."

About Jacobi

Jacobi is a global investment technology provider for multi-asset investment teams. Capabilities include model portfolio design, analysis, and client engagement. Its unique "open architecture" platform allows users to tailor private deployments of the platform by integrating their own code, models, data, analytics, and applications.

Founded in 2014, Jacobi provides its technology to top-tier investors across the globe, including some of the world's leading asset and wealth managers, pension funds, asset owners, and investment consultants. With roots in institutional asset management, Jacobi has seen strong demand from wealth managers in need of 'institutional-grade' technology.

About FE Investments

FE Investments provides discretionary fund management services for financial advisers across the UK. Our investment philosophy focuses on controlling risk and maximising diversification. We combine decades of fund data analysis and sector-leading technology with the expertise of our dedicated investment team to help you achieve your investment goals.

Since launching our discretionary managed portfolios in 2015, we have won multiple awards and been named as one of the fastest-growing discretionary fund managers in the UK, with £4 billion of assets under management (as of December 2024).

FE Investments is part of FE fundinfo, which works with thousands of fund managers, fund distributors, financial advisers and channel partners across the globe, helping them to be better connected and better informed. Our industry-leading data, technology, insight and expertise is used by investment professionals to research, distribute, market and invest in funds and model portfolios, leading to more efficient investment decisions.

For more information, please visit fefundinfo.com.

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