

# Press release

23 December 2019

## **Dolphin expands product offering to include gold in portfolios**

Dolphin, an independent and agile wealth management platform, today announced that the range of asset classes it can include in client portfolios has been expanded to paper gold. Other precious metals are expected to follow.

The investment management team at Dolphin offers clients bespoke portfolio design, identifying the specific needs and goals of investors to build tailored solutions. Although the precious metal has long been available to Dolphin clients as an investable asset, either via futures or ETFs, this is the first time paper gold has been incorporated into portfolios. Paper gold is a derivative of the physical metal and can be converted to physical gold. Gold acts as a safety play in turbulent or uncertain markets.

The investment universe available to Dolphin clients spans government bonds, corporate credit, equities, commodities and currencies via direct exposure to markets or the use of exchange traded funds, mutual funds, hedge funds, futures and options. These cover more than 120 markets worldwide, including developed, emerging and frontier markets.

Simon Black, Head of Investment Management at Dolphin, said: “In an economic climate that we believe will remain challenging next year, the addition of paper gold into client portfolios provides clients with a similar level of comfort to that which they get from real estate. The reason is simple: it’s tangible. This comfort, combined with the diversification, safety and relative low correlation to other asset classes makes gold an important holding in uncertain times.”

Amir Nabi, Chief Operating Officer at Dolphin, said: “Specific challenges exist in providing reporting valuations on gold. Thanks to our strong sub-custody network and ability to quickly adapt our in-house systems, Dolphin clients are now able to view gold in their portfolio valuations alongside all their other assets, reported on a currency-like basis.”



## About Dolfin

Dolfin is an independent and agile wealth management platform. We provide world-class custody, execution and investment management to private clients, financial advisers and institutional investors.

We pride ourselves on our ability to help, to be a one-stop-shop. This has earned us the status of true partner to our clients, who repeatedly come to us first with their new projects and ideas.

We open investment accounts promptly and safeguard assets; share our infrastructure; provide access to capital markets worldwide; and offer sophisticated investment expertise.

Our platform enables the likes of wealth managers, external asset managers, multi-family offices, small private banks and emerging fund managers to grow their business with simplicity and speed.

Founded as a London-based wealth boutique in 2013, today we offer diversified financial solutions, an international presence, and our own bespoke technology. Although we now look after more than \$3.9bn of client assets and handle around \$650m of brokerage flow every month, the commitment that drove us in those early days endures: we think differently and act faster than most.

Dolfin is the trading name of Dolfin Financial (UK) Ltd, a company authorised and regulated by the Financial Conduct Authority and registered in England and Wales. Some of the services described are provided by Dolfin Asset Services Ltd, a company registered in Malta authorised and regulated by the Malta Financial Services Authority. Dolfin Financial (UK) and Dolfin Asset Services Ltd are subsidiaries of Dolfin Group Ltd, an exempted company organised under the laws of Bermuda.

## More information

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