

Charles Stanley bolsters research capabilities with two senior hires

Charles Stanley, a leading financial services company, is pleased to announce the appointment of Abbas Owainati as Head of Asset Allocation and Amish Patel as Head of Equity Research. These strategic hires signify the company's commitment to enhancing its research capabilities and maintaining its position as a leading investment firm.

Abbas Owainati has joined Charles Stanley in the newly created role of Head of Asset Allocation, bringing with him a wealth of experience in the financial industry. Abbas' background includes a successful tenure as a Macro Strategist for the BT Pension Scheme Management (Brightwell), where he played a pivotal role in shaping investment strategies for the £47 billion scheme.

Prior to this, Abbas held roles as a Macro Strategist at Quilter Investors (formerly Old Mutual Global Investors) and as an Economist, with a focus on Asset Allocation. His deep understanding of global markets and asset allocation will undoubtedly prove invaluable as he leads the asset allocation team at Charles Stanley.

Also starting in October, Amish Patel has assumed the position of Head of Equities at Charles Stanley, adding further strength to the company's already robust equities division, which also benefits from input from Raymond James Financials US-based research capabilities. Amish joins from Quintet Private Bank, where he was a Senior Equity Analyst and Strategy Lead, US Equities.

Prior to this, Amish was a Senior Equity Analyst at Talisman Global Asset Management and held analyst roles at Quilter Cheviot and Janus Henderson. His knowledge and expertise in equities make him the ideal candidate to lead Charles Stanley's equities department into the future.

Both Abbas and Amish will report directly to Patrick Farrell, Chief Investment Officer at Charles Stanley. They join the 20 strong research team whose focus is on delivering in-depth research and insights on macro strategy, collectives, and stocks to support investment choices for the benefit of client portfolios.

Patrick Farrell, Chief Investment Officer at Charles Stanley, remarked, commented: *"The appointments of Abbas and Amish underscores our dedication to building a world-class team that can deliver well-researched investment solutions to our clients. We believe that their knowledge and expertise will further strengthen our capabilities and enhance our ability to navigate the ever-changing investment landscape."*

"Both individuals bring a wealth of expertise, and their appointments reflect our ongoing commitment to delivering exceptional investment services to our clients. We are confident that their leadership will contribute significantly to our future success."

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About Charles Stanley

Charles Stanley is a leading UK Investment Management Company. Its origins trace back to 1792. It provides services direct to private clients, charities, trusts and professional institutions. It also works with financial advisers, legal, accountancy and other professional services firms, supporting them with their client objectives.

It is dedicated to providing clients with the highest standard of service and peace of mind at every step of their financial journey, delivered by over 800 staff located in 26 offices across the UK. Its services comprise:

- **Investment Management Services**, offering personal discretionary, advisory and execution-only services.
- **Asset Management**, providing investment solutions serving retail, institutional and intermediary clients, such as our model portfolio service (MPS), mutual funds and fiduciary management.
- **Financial Planning**, advising clients on how to plan their finances to meet current and future lifestyles.
- **Charles Stanley Direct**, an award-winning digital execution-only platform that makes investing in a portfolio of funds and shares simple and cost-effective.

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