

**11 August 2017**

### **Liontrust recruits David Roberts and Phil Milburn**

Liontrust, the specialist independent fund management group, today announces the hire of fixed income specialists David Roberts and Phil Milburn.

The duo, who are to join Liontrust's Edinburgh office in early 2018, have a long and successful track record of managing fixed income funds. Following their appointment, Liontrust is to launch a **Strategic Bond Fund, High Yield Bond Fund and Absolute Return Bond Fund**, subject to appropriate regulatory approvals.

David is currently head of the fixed income team at Kames Capital, and Phil is head of investment strategy of the team.

**Liontrust's Chief Executive John Ions commented:** *"David and Phil will be an excellent addition to our existing seven fund management teams, and we look forward to promoting them to our client base in the UK and Continental Europe."*

*"David and Phil's investment style means their funds provide diversification away from many of the other popular fixed income funds. Another attraction for us is the fact that David and Phil have a strong investor following, particularly among intermediary clients in the UK."*

*"The recruitment of David and Phil will not only expand our fund management capability but also strengthen further our fixed income proposition. Their investment style complements that of our Sustainable Fixed Income team of Stuart Steven, Kenny Watson and Aitken Ross."*

The appointments follow Liontrust's recent [£2.5bn acquisition of Alliance Trust Investments](#), and the hire of Oisín O'Leary to expand the [Liontrust European Income Team](#).

Liontrust was advised by Forrester Partners.

-Ends-

**Lora Coventry, PR Manager**

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#### **Notes to Editors**

##### **About Liontrust**

*Liontrust Asset Management, which was launched in 1995, is a specialist fund management group with shares quoted on the London Stock Exchange.*

*Liontrust manages £9.3 billion (as at close of 30 June 2017) and was named Specialist Group of the Year at the Investment Week Fund Manager of the Year Awards 2017.*

#### **Background on new fund managers**

##### **David Roberts**



David Roberts is currently head of fixed income at Kames Capital and is responsible for managing the fixed income team. In addition, he co-manages several funds including the Kames Strategic Bond Fund. David joined Kames Capital in 2004 from Britannic Asset Management where he was head of credit. He worked in the banking sector for a decade before moving into asset management. David studied Economics and Industrial Relations at the University of Strathclyde and has an MSc in Investment Analysis from the University of Stirling.

#### Phil Milburn

Phil Milburn is currently head of investment strategy in Kames Capital's fixed income team. He joined Kames Capital in 1997 from the University of Edinburgh, where he earned a first class honours degree in Economics. After spells in UK and Latin American equities, Phil joined the Kames Capital fixed income team, where he manages their strategic and high yield bond portfolios.