



Fergus Macfarlane, CAIA

Profile

I am a CAIA qualified investment specialist who has been working in asset management for more than seven years. My most recent position was within an insurance-backed private credit department where I was responsible for helping drive the externalisation of the business through the launch and capital raise of new pooled funds. I had a key role in delivering the firm's first private credit fund to market and growing it to a multi-£100m product. Prior to this I have held various distribution roles including (institutional) sales and marketing, covering all asset classes.

I am a people person and enjoy working in client-facing roles within collaborative, dynamic and stimulating environments. I have taken a career break in the first half of 2024 off to fulfil a dream of travelling in Asia and am now ready to continue my career within investment management.

Professional History

Octopus Energy Generation (Maternity Cover)

September 2024 - Now

Investor Relations Manager

- Institutional IR and fundraising support for OEGen's flagship renewable energy investment strategy.
- Working across Private Equity, Infrastructure and Corporates.

Career break - India, Vietnam and Indonesia

January 2024 - July 2024

Legal & General Investment Management

April 2020 - January 2024

Investment Specialist - Private Credit

I was one of two specialists covering a £17bn private credit business incorporating corporate, real estate, infrastructure and alternative debt asset classes. My position, acting as a conduit between investments and distribution, encompassed capital raising support, investor relations, product development and marketing. I was required to develop a thorough understanding of the private credit investment landscape as well as our existing holdings, pipeline transactions and portfolio dynamics.

Responsibilities and achievements:

- Capital raising and marketing: I conducted client meetings, pitches, and education sessions as the representative specialist for private credit. This included delivering a session to more than 200 pension fund trustees on the portfolio benefits of an allocation to real assets (available at <https://www.lgim.com/uk/en/insights/trustee-education/>). I supported the internal sales process through the provision of product training and completion of up-to-date marketing collateral such as presentations, DDQs and thought pieces.
- Relationship management: I served as the 'go-to' contact for internal sales teams and point person for day-to-day investor queries regarding investment decisions, market views and general fund updates. I have proven experience networking with investors at conferences and other industry events.
- Product development: I supported the implementation of product strategy as the lead on various investment related work streams. I had a key role in the successful start-to-finish launch of the firm's second private credit pooled fund. I also helped design the ESG framework for our funds including writing and delivering the department's inaugural responsible investment policies.

Investment Associate - Private Corporate Debt (secondment)

January 2023 - June 2023



This was a short-term placement in the private corporate debt deal team where I helped source portfolio appropriate assets, conducted due diligence and presented at investment committee. The deals I presented to committee and which we ultimately invested included an Icelandic renewable power company and a UK building materials provider.

This experience gave me valuable exposure and insight to the day-to-day investment process and was highly complementary to my position as an investment specialist.

Janus Henderson Investors

RFP Writer

August 2016 – March 2020

June 2017 – March 2020

I project managed the production of client tender and due diligence materials for wholesale, institutional and hedge fund distribution teams across all asset classes.

Responsibilities and achievements:

- In 2019 I was selected to travel to India for two weeks to devise and conduct a training plan on Janus Henderson products and systems to new staff in an outsource centre.
- I have shown an ability to engage with and coordinate people in order to complete projects of work on time and to a high standard. All my proposals were completed to deadline which is a testament to my time management skills and ability to prioritise work.

Institutional Sales Support – Global Distribution

August 2016 – June 2017

The role function was to provide adequate and timely support to the sales directors in order to allow them to focus on selling to prospect clients and managing existing client relationships.

Tasks and responsibilities included:

- Providing research packs and analysis on prospect clients
- Production of executive level management information
- Hosting client meetings

SThree Group

Recruitment Consultant - Financial Services

December 2014 – July 2016

- I had responsibility for looking after my own client and candidate base and building a book of business.

West Wittering Estate PLC

Senior Beach Lifeguard

2009 - 2014 (Seasonal)

I had shared responsibility for a team of up to 12 people tasked with beach and water safety in an area which can attract up to 60,000 visitors. I was frequently required to use my training and experience to respond to unpredictable situations including the rescue and resuscitation of a swimmer.

Skiworld, Austria

Chalet Host

2013 - 2014 (Winter Season)

- I had responsibility for all aspects of the running of a 14-person chalet in St. Anton, Austria.

Education and qualifications

- CAIA
- IMC
- CFA Certificate in ESG Investing



- BA Social Policy and Crime, 2:1 (University of Leeds)

Interests and volunteering

- I do voluntary work for Carers First (as a telephone befriender) and RedStart, a charity which provides accessible financial education to children from underprivileged backgrounds.
- Sport - particularly surfing and football. I captained a Sunday-league team for eight years.
- Geopolitics and Russian history and culture. At University I wrote my dissertation on the state involvement in organised crime in Soviet and post-Soviet Russia.