

James Maltin | Founder, RIM (BVI) Limited

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Professional profile

Experienced investment executive who has spent the last 20 years managing multi-asset portfolios for private and institutional investors in the UK and overseas. James founded Ridgeway Investment Management in 2017 after 11 years at Rathbone Brothers Plc and, prior to that, five years at HSBC Investment Bank. Ridgeway has grown from zero to more than £300m under management in three years. Now James is establishing RIM (BVI) Limited alongside Ridgeway to serve a particular market niche, managing funds across multiple segregated mandates for professional clients in the British Virgin Islands. RIM (BVI) Limited's focus is on capital protection, income generation, and preservation of capital in real terms.

Executive skills

- Big picture thinker, sees projects through to fruition;
- proven leadership ability yet comfortable leaving others to take the initiative without interference;
- perceptive analyst who asks pertinent questions;
- effective delegator, encourages teams and collaboration;
- excellent communicator and accomplished listener;
- energetic and positive, brings natural enthusiasm to all projects.

Career summary

October 2017 – Present

**Ridgeway Investment Management
Founder, CEO and CIO**

Outline

Ridgeway Investment Management has developed a proprietary investment process which is implemented with discipline and applied to specific mandates. The programme protected clients' capital during the stock market crash of March 2020, whilst ensuring portfolios were well positioned to benefit from the recovery.

Key responsibilities

- Business management and strategic planning.
- Client acquisition, management and retention.
- Portfolio management.
- Development of investment proposition and ensuring accurate implementation within client accounts.

Key achievement/projects

- Successfully built the business from zero to £300m AUM within first three years.
- Outperformed the stock market by 20% in Q1 2020.

May 2017 – October 2017

**Cure Leukaemia
Fundraising**

Outline

During the period when restrictive covenants prevented James from working in financial services, he made up a team of four to undertake cycling's three 'Grand Tours' - the *Giro d'Italia*, *Tour de France* and *Vuelta a Espana* - to raise funds in support of the Centre for Clinical Haematology at the Queen Elizabeth Hospital in Birmingham, via charity Cure Leukaemia, of which he is Patron. After completing the Tour de France, James cycled 160 miles from Paris to Calais before jumping in a kayak and paddling for 11 hours, solo and unsupported, across the Channel to Dover, from where he ran 80 miles home to Westminster.

**January 2006 – April 2017 Rathbone Brothers Plc
Investment Director**

Outline

As an Investment Director at Rathbones, James managed discretionary private client capital, SIPPs, trusts and charitable foundations. James also represented the company to the media, predominantly the Financial Times and other national publications, as well as regular markets guest on Jazz FM's Business Breakfast. As Chairman of the Rathbone Brothers Foundation Committee, James oversaw the company's charitable donations. He also was Editor of the company's magazine, distributed quarterly to 30,000 clients. In his spare time, James organised a team of 15 riders to cycle from Greenwich to Paris, raising funds for Cure Leukaemia.

Key responsibilities

- Direct equity and fixed income investments and allocation of capital to external managers.
- Member of the Strategic Asset Allocation Committee and responsible for disseminating information to the national press.
- Regular contributor to and editor of Rathbones Review, the company's quarterly client publication.
- Chairman of The Rathbone Brothers Foundation Committee, including devising criteria for sifting through requests received and ensuring donations given were used to good effect.
- Organised the company's cycling team to ride from London to Paris in aid of Cure Leukaemia.

**August 2000 – December 2005 HSBC Investments
Senior Investment Manager, Head of Investment Trusts**

Outline

Chairing a team of analysts mandated to recommend a broad range of investment trusts to the firm's fund managers, in addition to managing a portfolio of clients.

Education and qualifications

- **Value Investing** – Columbia Business School - 2018
- **Masters in Finance MSc** – London Business School – 2006
- **Fellow and Charter Holder** - Chartered Institute for Securities and Investments – 2006
- **Philosophy & Theology BA(Hons)** – University of Durham – 1997
- **Bradfield College, St Bartholomew's School, Winchester House School**

References available on request
