

Due Diligence at a glance

Parmenion group*



Financial strength

Gross flows: £3.3bn†

Cash balances: £18.7m

EBITDA: £19.2m

Revenue: £53.7m

Costs in the core business: £41.4m



Customer base

1,365 Active firm partnerships

76,242 End clients

£16.4bn AUMA

Over 350 DFM portfolios



ESG Credentials**

£5.6bn in ESG portfolios

All active Parmenion ESG portfolios **Diamond Rated by Defaqto**

14-year investment track record

Moneyfacts **Best ESG Provider**



Company structure

Ownership: majority shareholder Preservation Capital Partners, minority stakeholder AssetCo PLC (now River Global), Parmenion staff also stakeholders

Sales and service:

Business Development team: 18
Client Services team: 17
Customer Success team: 12

Investment team: 9
ebi team: 36
Bigrock team: 4

In-house technology: built to run DFM and Advisory MPS

IT and operations: agile tech development with 2 weekly updates

Parmenion platform



Outstanding service

92% of calls answered in 20 seconds or less

Almost all queries are resolved in just one call

4.8/5 average rating for our live chat

99.9% of work processed accurately first time

100% of all new business applications processed or queried within one working day

97% of all transfers were chased within 10 business days

94% of emails responded to within two working days



Operational statistics

Total processes: 404k

Client trades: 12.2m

92% of transfer cases manually chased within SLA

99.97% platform uptime – uninterrupted service



Awards and ratings



More 4 and 5 Defaqto Diamond rated MPS solutions than any other provider



Our range of DFMs***



* 'Parmenion group' refers to Parmenion Capital Partners LLP, ebi Portfolios LTD and Bigrock

** all solutions with the word ethical, ESG, responsible, climate, positive impact or sustainable in the solution name Gold and five star rated by Defaqto

† Estimated ebi figures

Information at December 2025

*** for our full range, please go to parmenion.co.uk