

COLLINS SARRI STATHAM INVESTMENTS LIMITED

COMPANY BROCHURE

Award winning stock
broking advisory service

Scan this code using your
smart phone camera app to
open an advisory account



SCAN ME



Collins Sarri Statham Investments Ltd. is authorised and regulated by the Financial Conduct Authority No. 483868
Registered in England and Wales Company No. 6539190

Collins Sarri Statham Investments (CSS) is a privately owned stockbroking firm. Our mission is to help clients build investment portfolios that are customised to each individual's investment objectives.

At CSS we pride ourselves on our focus on our clients. We understand that they are often busy and time constrained. This is where our approach is different. We take the weight, reducing the time they need to spend on investment decisions.

Clients of CSS receive a truly personalised service that allows us to identify and deliver exactly what they seek from a stockbroker. We keep our client to broker ratio low to ensure their assigned broker deeply understands their portfolio and will only make recommendations that meet their specific investment objectives. With CSS, you don't get lost in the crowd.

“We keep our client to broker ratio low to ensure we deeply understand our clients investment portfolio”

Award-winning Stockbroker

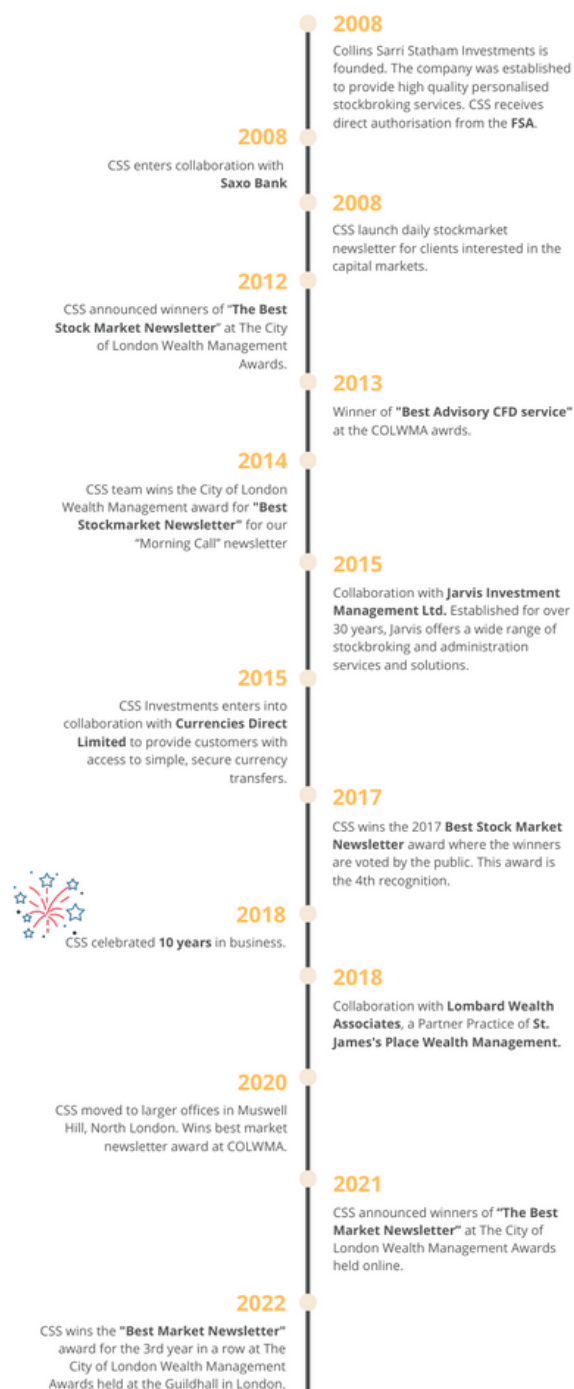


We have won a number of industry awards for our innovative services.



A BRIEF HISTORY OF CSS INVESTMENTS

The last 14 years have seen the markets ebb and flow with the banking crisis of 2008 followed by a long bull market run. More recently the effects of Brexit and Covid-19 have shaped the investment landscape. A lot has happened since our inception, here is a snapshot.



COLLINS SARRI STATHAM
INVESTMENTS

WHAT OUR CLIENTS SAY ABOUT US



"I've been investing with CSS for about 8 years now and they've always been extremely professional. They offer sound, well reasoned advice and recommendations and help me manage my portfolio effectively and successfully. Ravi has provided first rate analysis and Damian has gone out of his way to stay in touch despite my excessively busy diary. Very positive experience all round."

J. Saltmarsh

"Have been with CSS for a long time. Find them very helpful and keeping investor updated with the portfolio. Customer service is good."

P. Vora

"CSS as a financial broker offers a quality personal service at a sensible cost over the whole gambit of investing. Their Daily commentary on the market and portfolio software are highly commended."

D. Bolton

"Good, sound research backed advice delivered in a professional and friendly manner. You get the strong sense that they really do put your interests first."

D. Izett

"I have already recommended CSS to a couple of friends. I have been more than pleased with the way they have actively managed my portfolio and am very grateful for that."

P. Pearce

"A personal service that respects and works in tandem with the investment criteria of the client"

S. Dalton Morris

4.7 rating on Google reviews



A MODERN STOCKBROKER

CSS Investments is a modern stockbroker with access to high quality financial information providers including Fidessa.

We are committed to providing our clients with relevant, incisive and current decision making information. Our clients receive our award winning daily newsletters, market and company analysis and have regular contact with a personal broker.

For those clients choosing to manage their own investments then the online trading platforms, provided by Saxo and Jarvis, are an ideal partner. They are innovative, informative and most importantly, simple to use.



Collins Sarri Statham Investments Ltd is an introduction broker to Saxo Capital Markets UK Ltd who are part of the Saxo Bank A/S Group.



Our partnership with Jarvis Investment Management Ltd allows us to provide you with a traditional share and bonds service.

*Stay in touch with your investments 24/7
– you can connect on the go using your laptop,
tablet or smartphone.*



TRADITIONAL VALUES

Building long-term relationships with low client to broker ratios, trust and integrity.

At CSS we have pooled a team of qualified, experienced and talented brokers, analysts and senior industry practitioners. Each draw on their unique experience to deliver a professional trading experience to our clients.

We pride ourselves on our customer service and fully embrace the FCA's Treating Customers Fairly initiative.

Taking a conscientious and dedicated approach, CSS works hard to maintain an atmosphere of trust and pride in our service.

With the aid of a variety of investment tools our brokers work in partnership with clients to assist them in reaching their investment objectives.



“Our clients receive a highly personal service from their dedicated broker”

PRODUCTS



Shares

We advise on a wide range of equities in the UK, US, Europe and Emerging Markets.



Fixed Income

For clients looking for fixed income or to diversify their portfolio we can assist by investing in Sovereign, Government and Corporate Bonds.



ISA

We can advise on investments held within a tax efficient Stocks and Shares ISA account.



SIPP

We can advise on the shares and investments held within a Self-Invested Personal Pension, structured to meet their individual investment objectives and time frame.



CFDs

For more speculative trades, clients can take advantage of our experience and allow us to advise on CFD's. However, such products have a higher risk to your capital.



ETFs

We can trade ETFs on 36 stock exchanges worldwide.

SERVICES



Advisory

We offer a personalised service from a dedicated broker who will help and advise you on your investment strategy, portfolio structure and holdings.



Execution Only

We are able to facilitate those clients who like to trade on their own ideas.

For more information about our products and services please visit www.css-investments.com or call 020 8057 6380



MANAGEMENT TEAM



Wayne Collins
Founding Director

Wayne is one of the co-founders at Collins Sarri Statham Investments, with 25 years of financial services experience; Wayne is predominantly responsible for the strategic leadership and financial planning of the company. He is a qualified Stock broker having passed both the IMC and IAD securities diploma.

"Our aim is to bring a structured approach to our clients investment portfolio's that exceeds their investment goals within the required time frame. I believe that an old fashioned traditional stockbroker perspective is still needed in the ever changing world we live in – and experience has to be earned and lived, it cannot be taught or replaced".



Luca Sarri
Founding Director

Luca is a Director and Co-founder of Collins Sarri Statham Investments since 2008 and has been a London based private client Stockbroker for over 20 years. Luca is a Chartered MCSI member and holds an Investment Advice Diploma (IAD) for Securities and Derivatives.

"Our vision at Collins Sarri Statham Investments is to create a leading brand that is able to provide the private investor with a wide range of products at competitive prices. We have built a talented team here at CSS and we are committed to providing an exceptional level of service to our clients. We are excited about opening our new office in the high street of Muswell which marks CSS Investments as one of the few brokers directly open to the public"



Damien Brown
Senior Stockbroker

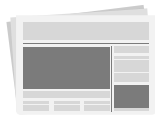
Damien is a Chartered Fellow of the Securities Institute who has over 15 years' experience as a Private Client Stockbroker in London providing concise and knowledgeable advice on existing portfolios and structuring portfolios for income and growth. During this time Damien has become adept with dealing with the needs of a wide spectrum of clients and developed a broad knowledge of the U.K. stock market. Damien holds a Level 6 Private Client Investment Advice & Management Certificate and is an External Specialist for the Securities Institute, which involves syllabus and exam reviews.

Damien says "Given the volatility of the world economic situation, clients demand clarity and expediency in the advice they receive from their broker and here at CSS Investments this is what we strive to deliver in a professional manner".



Ravi Lockyer
Head Strategist

Ravi Lockyer has over 20 years' experience in the financial sector, both in broking and journalism. As Senior Analyst at Collins Sarri Statham Investments, Ravi has a broad remit advising private clients and producing the majority of in house analysis. In addition he has written extensively about smaller UK companies and trained staff in research techniques. Other experience includes shipping operations and real estate following the award of his MSc in Shipping, Trade & Finance at City University in 1996. Ravi has appeared on Bloomberg TV, and other TV channels as well as being quoted in major UK newspapers. His insights are always informative and well researched.



MARKET NEWS



Use your camera
app to scan and
subscribe!



The Morning Call – Winner of COLWMA (2012, 2014, 2015, 2017, 2020, 2021 & 2022) Best Stock Market Newsletter.

If you are interested in the stock markets and getting access to market news and information, join our community of investors who receive our free 'Morning Call' and 'Market Close' emails.



Director Luca Sarri, collecting the 2022 & 2020 Stockmarket Newsletter awards at COLWMA.

Client Resources

We cover topical issues and investment ideas in great depth. We want to explain our approach and understanding as well as answer your comments to the points raised.

Our readers might not always agree with our articles but we can guarantee they are thought provoking and insightful.

Using our market commentaries, investment guides and educational materials we aim to help readers further their investment insight and hopefully reach their investment goals.

We provide via our commentaries and articles our unique insight and investment experience, theorising, but also explaining how and why markets react in the way that they do. Basically we aim to demystify the issues for our readers and clients.

Our Morning Call and Market Close updates include the following information:

Highlights of the Day

Headline global economic news and overseas market updates including forthcoming economic data previews.

Daily News

All the relevant data from the companies reporting for the day along with any important news that is likely to affect market movements.

Company Reports

Company diary of all the major UK companies reporting for the week ahead.

Market Movements

On the bell UK and European Indices, and leading commodity movements and shares.

Research

Research notes from our in house analytical team on indices and individual companies.

Latest Broker Views

A UK roundup of recent broker company upgrades and downgrades.

Join thousands of readers of our stockmarket newsletters:
www.css-investments.com/newsletters



Risk Warning

Trading in the products and services offered by Collins Sarri Statham Investments Ltd (CSS) may, result in losses as well as profits as the value of investments may go down as well as up. You may not get back the full amount you have invested. Any reference to past performance should not be viewed as an indication of any future performance. Investments held in overseas markets are subject to the effects of changes in exchange rates which will impact on the value of the underlying investment. Investments made in AIM and penny shares carry an increased risk due to the difficulty in creating a market in these shares. There may be a substantial difference in the buy and sell price. Leveraged products such as Contracts for Difference (CFDs), derivatives, commodities & Foreign Exchange (FX), carry a higher risk to your capital and they can lose their value rapidly.

We advise you to read any literature we provide carefully before making any investment decisions.



COLLINS SARRI STATHAM
INVESTMENTS

A modern stockbroker with traditional values

Collins Sarri Statham Investments Ltd

138 Fortis Green Road, Muswell Hill, London, N10 3DU.

Tel: 020 8057 6380

Web: www.css-investments.com

Email: info@css-investments.com

Collins Sarri Statham Investments Ltd. is authorised and regulated by the
Financial Conduct Authority (Registration No 483868).
Registered in England and Wales (Company No 6539190).



COLLINS SARRI STATHAM
INVESTMENTS

STOCKBROKERS

EST. 2008