PIERPONT

LM Capital Group

LM Capital Group | Rebranding a Global Fixed Income Asset Manager Around an Evolved Value Proposition

CHALLENGE

LM Capital Group is a minority owned, employee owned global fixed income asset manager founded in 1989, with approximately $5 billion in assets under management for institutional public plans, Taft-Hartley funds, corporations, endowments, foundations, healthcare providers and OCIO partners. The firm's value proposition had evolved well beyond how it presented itself. Its brand and its primary pitch book still described a traditional core fixed income shop, understating the proprietary macroeconomic process, the emerging market debt allocations and the downside protection record that now define the firm.

OBJECTIVE

Pierpont was engaged to rebrand LM Capital Group around the firm it had become rather than the firm it had been. The work centered on a new messaging platform, internally called North Star, and its expression across the firm's most important sales asset, a 49 page institutional pitch book. Four goals framed the engagement. Bring every page into alignment with the new value proposition and visual identity. Make the firm's proprietary five step global investment process legible and navigable, since that process is the value proposition. Give the firm's signature differentiators graphics strong enough to carry a live pitch.

SOLUTION

Pierpont started with knowledge transfer rather than design. Working page by page with LM Capital's Investment Strategy Group, distribution leadership and compliance stakeholders, the team documented what each slide was meant to accomplish, what content was mandatory and where the story was being lost. Those sessions, along with each subsequent client review round, were synthesized into thematic creative briefs covering format, visual direction, section architecture and page level direction, so the design team worked from organized strategy instead of raw meeting notes.

The rebrand established a full visual system built on LM Capital's refreshed color palette, with navy and gray carrying structure and the secondary palette reserved for data. The book moved to a landscape format with larger type, sharper geometry and a consistent header, footer and numbering framework across all 49 pages. Narrative copy throughout was rewritten against the

North Star messaging platform so that the firm’s positioning as a global fixed income asset manager, its macroeconomic discipline and its emerging market debt expertise carried through every section rather than surfacing only in the appendix.

The most substantive work went into the investment process section, which is where the evolved value proposition actually lives. Pierpont introduced persistent step markers so a reader always knows where they are in the five step sequence. The trend identification score, previously shown as a raw matrix, was rebuilt as an equalizer style scale mapping each country’s score to a favorable or unfavorable fixed income view. The sector allocation graphic was redrawn to show how that score translates directly into portfolio positioning. Two dense security selection pages were consolidated into a single funnel graphic moving thousands of eligible issuers through the firm’s selection criteria to its approved list. The firm’s rule of law overlay, which its own advisors identified as the single most distinctive element in the book, was elevated from a footnote into a governing screen at the top of the process. Portfolio risk management was pulled out of the security selection step and given its own section.

RESULTS

LM Capital Group now presents itself as the firm it has become. The rebrand carried a refreshed identity and the North Star messaging platform through all 49 pages of the institutional pitch book, with the investment process section fully redesigned and approved through client review. The differentiators that justify the firm’s evolved value proposition, including the proprietary macroeconomic methodology, the trend identification score, the approved securities discipline and the rule of law overlay, are now carried by purpose built graphics rather than the internally generated placeholders they replaced.

For a boutique fixed income asset manager competing against firms many times its size in consultant searches and emerging manager programs, where the pitch book is often the first and sometimes the only artifact a prospect evaluates, the rebrand closes the gap between the quality of the investment work and the quality of its presentation.
