

A trusted investment partner for your clients



Helping your clients build long term wealth while strengthening the trusted relationships you've built.



\$2.4bn+

Funds under management*



NZ owned

Since 2007



Performance-driven

Active management approach

Solutions for your clients

► Investment Solutions

- 11 actively managed funds across growth and income assets
- Tailored advice for portfolios \$250k-\$1m

► Pie KiwiSaver Scheme

- Conservative, Balanced, Growth and Aggressive fund options
- Balanced and Growth funds ranked #1 for 1-year returns to March 2026**

► Wealth management

- Personalised advice for portfolios over \$1m
- Bespoke portfolios using Pie and external funds

Adding additional value to your business



Expert market updates

Timely insights to keep you up to date with global markets.



Client presentations online or in person

Flexible support for your client conversations.



Investment content for your communications

Regular, high quality content you can share with your clients.



Events and professional networking

Connect, learn and grow with like-minded professionals.



Mark Bull

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* As at 30 April 2026 **Morningstar KiwiSaver 360 report, March 2026 quarter, for 1-year returns to 31 March 2026. Information is current as at 30 April 2026. Pie Funds Management Limited is the issuer of the Pie Funds Management Scheme and the Pie KiwiSaver Scheme, the product disclosure statements of which are found on www.piefunds.co.nz. For information about our advice offerings, please see our disclosure statement at www.piefunds.co.nz. Past performance is not a guarantee of future returns.