



**PERFORMANCE EDGE**

Applying The Science Of Performance And Behaviour  
To Help Trading, Investing And Banking Professionals  
To Achieve And Sustain High Performance



**Steve Ward**  
Performance Edge Consulting



# Focus and Expertise

Leveraging research, practice and expertise in elite performance, behavioural science, decision science, psychology and physiology to deliver practical strategies and tactics that enhance decision making, risk taking and achieving and sustaining high performance for trading, investing and banking professionals.



## Client Groups

- Banks
- Hedge Funds
- Investment Firms
- Commodity Trading Houses
- Energy Trading Companies & Utilities
- Proprietary Trading Groups

## What We Have Delivered

Workshops, Training Programs, 1-1 Coaching, Consulting and Advisory, Speaking Engagements, Off-Sites, Assessments and Testing, Research Projects



# Traders and Portfolio Managers



Applying the science of performance, behaviour, decision making, psychology and physiology to enhancing trader and Portfolio Manager performance.



### 1-1 Trader and Portfolio Manager Coaching

Personalised coaching programs to help traders and PM's to optimise their decision making, improve their performance, and overcome any challenges they are facing.



### Trading and Investing Performance Presentations and Workshops

Bespoke presentations, and tailored group training sessions that can be focused on topics including decision making, risk taking, high-performance, trading and investing psychology, the physiology/biology of trading/investing, and developing a high-performance trading/investing process.



### High Performance Trading and Investing Programs

A combination of bespoke group training and individual coaching sessions focusing on enhancing decision making and performance, and exploring topics such as high-performance and process, decision and behavioural science, risk personality and behaviour, psychology and physiology.



### Risk Profiling

Using a risk focused psychometric test (see page 7) to help traders and PM's to develop 'risk aware decision making', leverage their risk type, and enhance their decision making; and helping trading desks, investment teams and businesses to map out their risk type distributions, uncover risk culture, and develop 'positive behavioural risk management' strategies.



### Physiological Lifestyle Assessments

Helping traders and PM's to develop an awareness of their physiological state on their risk taking, decision making and performance, and strategies for managing it. This assessment measures stress quantity and levels, sleep quality and quantity, recovery quality and quantity, and levels of physical activity and exercise.  
(see page 7)



### High Performance Trading/Investing Teams and Culture

Working with clients to help them to develop high performance teams, cultures and environments, including deepening their understanding of high performance, the factors that drive high performance, how to develop high performing traders and PM's, and how to sustain a high performance business over time.



# Trading, Investing and Banking Professionals

Presentations, workshops and training to teach practical strategies and tactics that enable people to achieve and to sustain high performance in high stakes, pressurised, results driven environments.



### High Performance

Take a deep-dive into understanding what performance really is, and how to improve it. What is performance? What is high performance? What role does context and culture play in high performance? What factors drive and sustain high performance? What is your performance recipe? What is the high-performance cycle? How can you enhance and develop high performance?



### High Performance Psychology

Developing the mindset and mental skills required to achieve and sustain high performance. Topics can include commitment and motivation, confidence, composure, managing emotions, focus and attention, dealing with setbacks, flexibility and adaptability, managing stress and pressure, and developing mental fitness and psychological flexibility.



### High Performance Physiology

Understanding the role of the body in enabling and sustaining high performance, and how stress and fatigue can impact it. The focus is on providing practical strategies including getting the 'stress versus recovery' balance right, stress management, sleeping well, developing the skill of recovery, physical activity and state management strategies such as breathwork and biofeedback training. Can also utilise the physiological lifestyle assessment (see page 7).



### Risk - The Human Factor, Decision Making and High Performance

How people perceive, react to and manage risk impacts their willingness to take on risk, challenge, change, and their creativity, innovation and decision making. These sessions focus on helping individuals and teams understand and leverage their risk type, attitude and tolerance for enhanced performance. Uses the Risk Type Compass assessment (see page 7).



### Enhancing Decision Making

Providing a practical set of tools to enable individuals to make more effective decisions, especially under conditions of uncertainty, stress and pressure. Drawing on research and practice from decision science, neuroeconomics and behavioural science. Can utilise the Risk Type Compass assessment (see page 7).



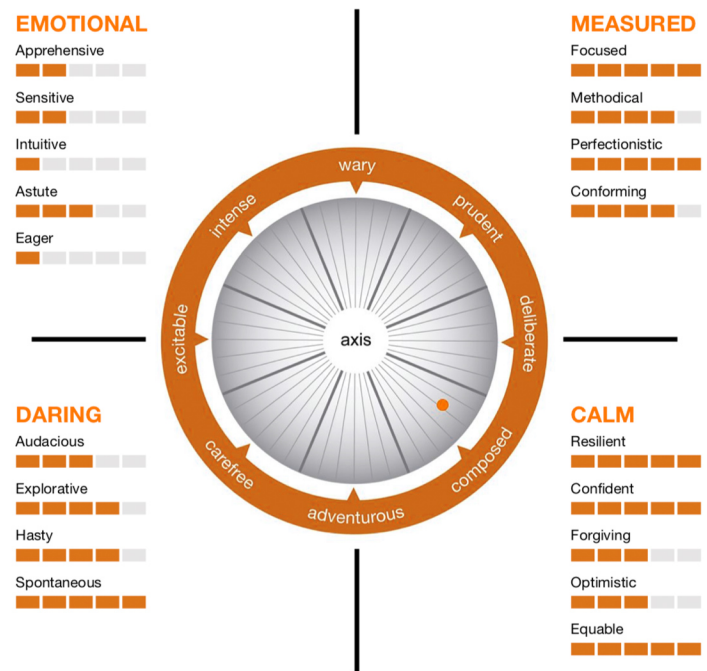
# Assessments and Testing

Using cutting edge psychometric and physiological assessments to get data to provide insights for enhancing performance.

## Risk Type Compass

The Risk Type Compass focuses on differences in the way individuals perceive, react to and manage risk, as well as how they make decisions.

The Risk Type Compass is a powerful psychometric tool for assessing risk type, risk attitude and risk tolerance. Reports can be produced for individuals looking to raise awareness of their own risk type and tendencies and for desks/teams/organisations looking to assess risk culture, diversification and team effectiveness.



## Performance Lifestyle Assessment

Well-being is a competitive edge. The Performance Lifestyle Assessment helps you understand the state of your well-being and what to do to improve it.

The Performance Lifestyle Assessment is a cutting edge biofeedback assessment which measures a person's balance of stress, recovery, sleep and physical activity over a 72-hour period – and allows for an objective view of the impact of their lifestyle on their performance, and provides a useful catalyst for change, helping people to make better choices both at work and at home for increased well-being, productivity and performance.



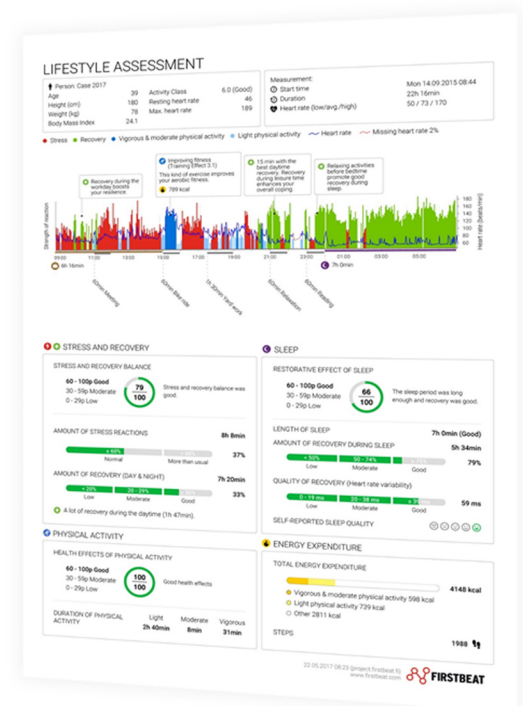
**Manage stress**  
Recognize activities that cause stress



**Enhance recovery**  
See how you recover during sleep



**Exercise right**  
See the effect of your exercise



# Feedback

## Coaching

Steve and I have worked together several times over my career and I have always found these periods to be deeply insightful and extremely valuable. Our monthly hour-long calls were such a beneficial part of the coaching. I found articulating what I was experiencing at the screens, discussing why I might be behaving that way and how I could improve was both cathartic and pivotal to my self-development. We looked at ways to manage unhelpful emotions and how to move on from bad trades. I always come off our calls reinvigorated and optimistic. I can't recommend Steve's coaching enough.

Proprietary Trader, London

I worked with Steve over a 6-month period last year in order to help improve my trading process. Whilst I was not going through any particularly bad spells of trading, I felt like I was not confident enough to fully utilise my risk and was getting caught in my own head too much when it came to trading, thereby not reaching my potential. Over the period of our work together I found Steve helped me to unbundle some of the mental hurdles I needed to overcome to feel more comfortable trading, allowed me to observe my thought patterns and limiting beliefs and start the work on getting around them. I found him to always be available to help me outside of the sessions, and fully focussed and dedicated towards my development in the time we spent together. Simply put, it was a great investment of time and a great trade.

Hedge Fund PM, Switzerland

My work with Steve has been an important factor in my performance and success over the last 2 years. He has helped me to stay focused on what matters, develop my trading approach, provide valued feedback on my performance and decision making, and teach me a variety of very practical and helpful techniques and strategies for developing my psychological strength, and energy levels.

Hedge Fund PM, London

Steve has helped me to develop my trading process, become more conscious of my trading edge, be better able to identify and reduce the impact of my biases, systematically increase my risk taking, and improve my ability to run my trades more efficiently. A combination of regular coaching sessions, weekly check-ins and periodic goal setting and reviews has enabled me to overcome any challenges I have faced and also to keep improving my trading performance.

Proprietary Trader, UK

The coaching program has been excellent. I have come out of the sessions more confident – both myself and the team. It was good to have a forum to discuss issues and ideas with someone who understands the dynamics of trading. The sessions helped me to act on more and improved my management of the team and have given the team better dynamics.

Energy Company Head of Desk, London

I have felt stressed at the beginning of prior years and performed below my potential as a result. I have made a large leap forward in my psychology of trading during the program and have had a much better start to the year from a process perspective than in any year prior. The impact of the coaching has been that I am more at ease and confident at this stage in the year. I am making better trading decisions. This has led to a leap in P&L as the result of consistent good trading is positive P&L over time. In the past I have tended to trade very well in the second two quarters of the year because I am under less pressure to make money. I am now able to trade in that mindset even at the beginning of the year. I am also able to separate my thinking from my P&L to my decision making and am making more money because I am making better decisions.

Bank Trader, London

Steve has an excellent and insightful understanding of the human mind and how it responds to the stresses of trading. I found his counselling and suggestions consistently added value and gave me greater focus to concentrate on my trading as I could ring fence and remove unnecessary thought patterns under his guidance.

Hedge Fund PM, London

Steve is a gifted communicator and powerfully intuitive coach. This has attracted some of the world's most outstanding traders and fund managers as clients. You see, it does not matter how much experience or success one has had in the business of trading the markets, everyone can use objective feedback or coaching to keep concentration levels up and performance on track.

Hedge Fund PM, New York



# Feedback

## Training

For traders / analysts interested in sharpening their psychological edge and ability to tap deeper into their mental and physiological performance, there's no one better I've come across in communicating super practical and powerful ways to improve than Steve Ward.

L&D Lead, Commodities Trading House

Steve delivered a very high impact piece of work for us in the development and delivery of a bespoke performance program for our highest performers across the business.

Head of Talent, Asset Management Firm

Trading wise, though we've had a bad couple of weeks recently, overall, the P&L is the best we've ever had by some margin. A lot of that is down to the skills you instilled in people. Certainly, a big improvement from this time 12 months ago.

Head of Desk, Bank

Having worked with Steve on numerous occasions I have complete trust every time that his insights, delivery and quality of training are of the highest standard, and are always prepared with the interests of the client in mind. Steve is one of few trainers I have met in the area of performance psychology, who really can back up the "theory" with credible application that delivers tangible results.

Head of Training, London Stock Exchange

## Speaking

Thank you very much, as always, for putting so much into your delivery and bringing the theory to life with a super credible feel. Everyone really got into the subject matter and the debates & discussions are still going on now! That's always a good yardstick for 'impact' I have found!

Head of Institutional Sales, Bank

Steve was the keynote speaker for our Investment Excellence graduate training in New York. He brought a powerful combination of scientific insights and practical experiences and delivered his teaching in a very professional, measured and engaging way to a demanding audience of over 50 graduates. Their feedback was strong and I would have no hesitation in recommending Steve to lead a workshop along similar lines.

Head of Investment Excellence, Investment Firm

As well as delivering very highly-rated small-group workshops for our markets performers, Steve Ward gave a talk in a large auditorium for us. He was very compelling, and held the rapt attention of a senior and discerning audience. He strikes a great tone, combining authority on the subject with endearing manner and humour. The content went down very well with the participants, and we have received many unsolicited compliments for it.

ED Human Resources, Bank

It really was an amazing day and the feedback has been fantastic. You managed the room so well and the engagement was excellent from all sides. I look forward to working together again soon!

Trading Leader, Bank

## Consulting/Advisory

Several years ago, together with Steve Ward, we started on a voyage of the development of a personal toolkit for increasing our psychological preparedness for the markets, for overcoming our challenges in decision making and for taking concepts like peak performance, wellness and mindfulness seriously, long before they left the arena of professional athletes and moved into the corporate sector. This has been a tremendous collaboration that has had a significant impact on our trader's performance and the success of the business in general.

CRO, Global Trading Business

I find myself frequently tapping into Steve's expertise as he is a real thought leader in the area of high performance and always has an informed but pragmatic perspective.

Head of Talent, Asset Management Firm

Steve's interventions on defining High Performance in a trading business were very thought provoking and insightful.

Head of HR, Commodities Trading House



**Call today**  
**+44 (0) 207 689 7513**