

BROCHURE SUPPLEMENT

FORM ADV PART 2B

Robert “Ted” Holmes
Blue Ocean Investment Partners Limited

Blue Ocean Investment Partners Limited
Suite 1002, 9 Steedman Street
London, SE17 3BA, UK

CRD Number: 297769

January 2024

This Brochure Supplement provides information about Robert “Ted” Holmes that supplements the Blue Ocean Investment Partners Limited Brochure. You should have received a copy of that Brochure. Please contact Blue Ocean Investment Partners Limited's Chief Compliance Officer (“CCO”) at +44 7500100055 or ted@blueoip.com if you did not receive Blue Ocean Investment Partners Limited’s Brochure or if you have any questions about the contents of this supplement.

Additional information about Blue Ocean Investment Partners Limited is available on the SEC’s website at www.adviserinfo.sec.gov and on the Financial Conduct Authority’s website at www.fca.org.uk.

Item 2. Educational Background and Business Experience

Robert Edward "Ted" Holmes pursued his education at Rice University (US), the University of Newcastle (UK), and James Madison University (US), earning a BBA in Accounting in 1992. His professional journey commenced with a three-year stint as a public accountant at Ernst & Young ("E&Y"). During this time, he obtained his Certified Public Accountant (CPA) designation and worked towards achieving his Chartered Financial Analyst (CFA) designation.

Ted furthered his education by obtaining an MBA from the University of Chicago Booth School in 1997. In 1996, he interned with Brinson Partners, known for its expertise in intrinsic value style investing, during the interim between his two years at the University of Chicago.

Upon completing his MBA, Ted joined Brinson Partners full-time and spent his initial decade as a technology analyst. As the firm evolved into UBS Asset Management, he relocated to London in 2008. Over the subsequent ten years, he climbed the corporate ladder, ultimately becoming the European Head of Equities.

Motivated by a passion for in-depth investment research and a desire to capitalize on the consistent undervaluation of certain high-growth, innovative companies, Mr. Holmes founded Blue Ocean Investment Partners.

A CFA Charterholder, Mr. Holmes successfully navigated the rigorous requirements of the Chartered Financial Analyst (CFA) designation. This includes passing a series of three six-hour competency exams covering diverse topics related to investment analysis and portfolio management, along with completing 36 months of qualifying work experience. Charterholders like Mr. Holmes adhere to a strict code of ethics and professional conduct standards.

Item 3. Disciplinary Information

Advisers are required to disclose any material facts regarding any legal or disciplinary actions that would be material to the evaluation of each investment adviser representative providing investment advice. There is no information of this type to report.

Item 4. Other Business Activities

Mr. Holmes serves on the Board of the City of London Investment Trust PLC, a FTSE250 publicly traded investment trust established in 1891. The Trust manages approximately £2.0b in assets. The board position requires that Mr. Holmes attend six Board meetings per year as well as other meetings as needed.

Mr. Holmes also serves on the Investment Committee for the King's Fund, a health care advocacy charity established under Royal Charter by the Prince of Wales in 1897. The Investment Committee membership requires that Mr. Holmes attend four Committee meetings per year as well as other meetings as needed.

Mr. Holmes serves on the Board of the River and Mercantile UK Micro Cap Company. The Company manages approximately £65m in assets. The board position requires that Mr. Holmes attend four Board meetings per year as well as other meetings as needed.

These responsibilities require approximately twelve full working days per year.

Item 5. Additional Compensation

Mr. Holmes does not receive any economic benefit from any non-client for providing advisory services.

Item 6. Supervision

As the sole person providing investment advice on behalf of Blue Ocean Investment Partners Limited, Mr. Holmes is responsible for his own supervision. His telephone number is (44) 7500 100055. Kroll, who act as our compliance consultant, provide limited oversight over certain aspects of Mr Holmes' investment activities.