PensionMandate

- Real-Time Leads
- Investors
- Consultants
- Managers
- Key Contacts
- Analytics

Database

Overall Statistics

Mandate Reports: 30K+(incl. 5K+ RFPs)

Investor Profiles: 10K+

Consultant Profiles: 600+

Key People: 15K+

Investor AUM: $23tn+

RFP Total Value: $400bn+

Name	Employer	Email	Phone
Ian Traylor	Rhondda, Cynon, Taff County Borough Council Pension Fund	Ian.D.Traylor@rhondda-cynon-taff.gov.uk	+44 01443 680613
Ian Howe	Leicestershire County Council Pension Fund	ian.howe@leics.gov.uk	+44 0116 3056945
I. Hollander	Werk en (re)Integratie (PWRI) Pensioenfonds	i.hollander@bestuursbureaupwri.nl	
Håkon Gjeitnes	Garde AS	haakon.gjeitnes@garde.as	+47 908 92 326
Hens Steehouwer			
Helen Burnham			
Hanspeter Stocker			
Hans Petter Willumse			
Hanno Ronte			
Haldor Sæteren			

Consultants	Type	Country	City
Frontier Advisors Pty Ltd	Consultancy	Australia	Melbourne
HamishWilson	Consultancy	United Kingdom	Surrey
1875 Finance SA	Consultancy	Switzerland	Geneva
3D Global	Consultancy	Cyprus	Cyprus
ACCESS PARTNERS	Consultancy	Sweden	Stockholm
AF Advisors			
AFB Anlagen			
AHC ADVISC			
AP Consultir			
ARETE CAPI			
AXIA ADVISC			

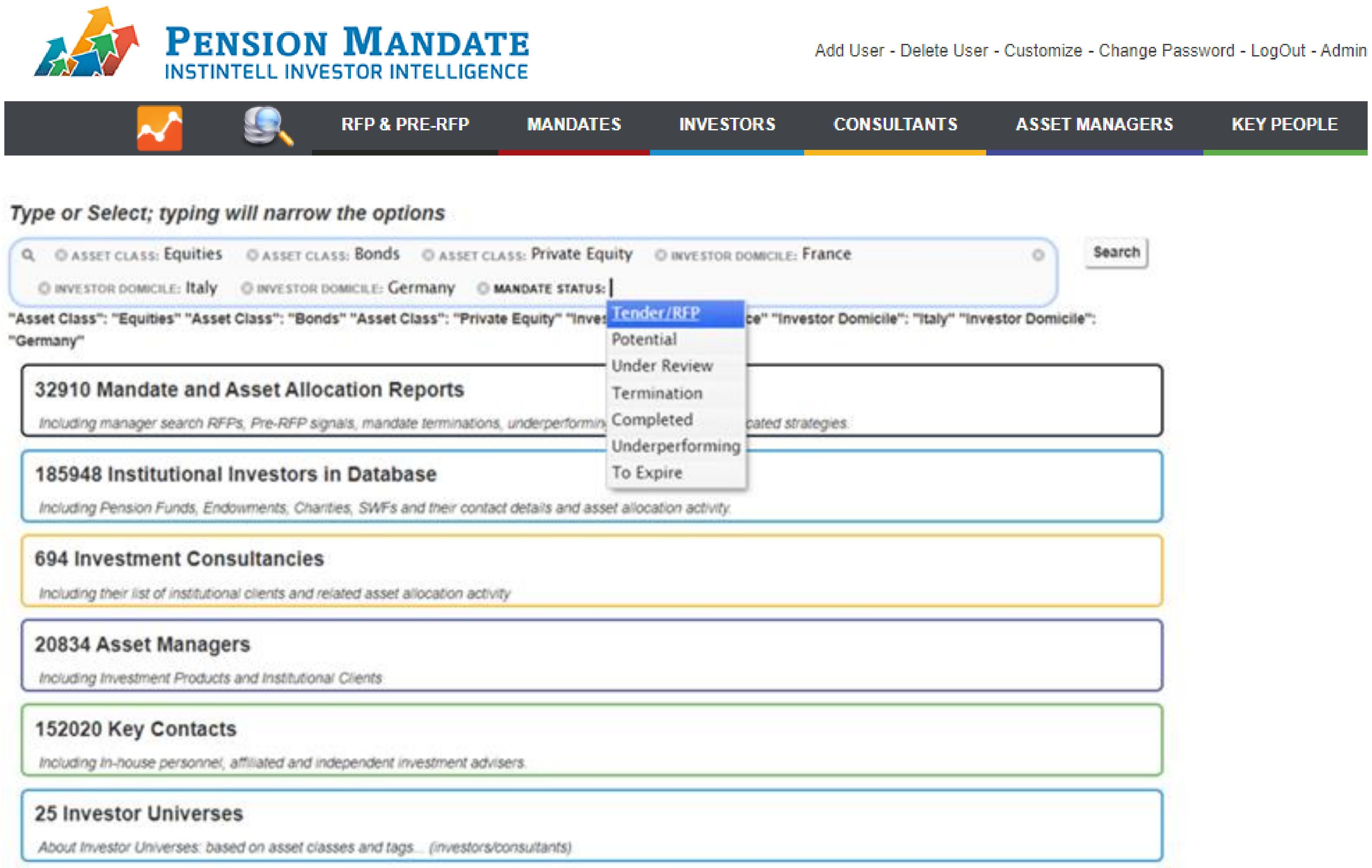
Institutional Investor Name	Value(€ million)	Investor Type	Country
New York City Employees Retirement System	163400	Pension Fund	United States
Kuwait Investment Authority	158000	Pension Fund	Kuwait
PIF-Public Investment Fund	140000	Pension Fund	Saudi Arabia
Employees' Provident Fund	140000	Pension Fund	India
Texas Teacher Retirement System	133300	Pension Fund	United States
Florida State Board of Administration	129516	Pension Fund	United States
Temasek Holdings	122400	Pension Fund	Singapore
St. James's Place	117990	Other:	United Kingdom
Government Employees Pension Fund	116100	Pension Fund	South Africa
Washington State Investment Board	115240	Other:	United States
SSF-National Council for Social Security Fund	110000	Pension Fund	China
Hong Kong Monetary Authority Investment	109000	Pension Fund	Hong Kong

Searches

Multifarious Features

We have built a series of Elastic, Semantic, Advanced Searches.

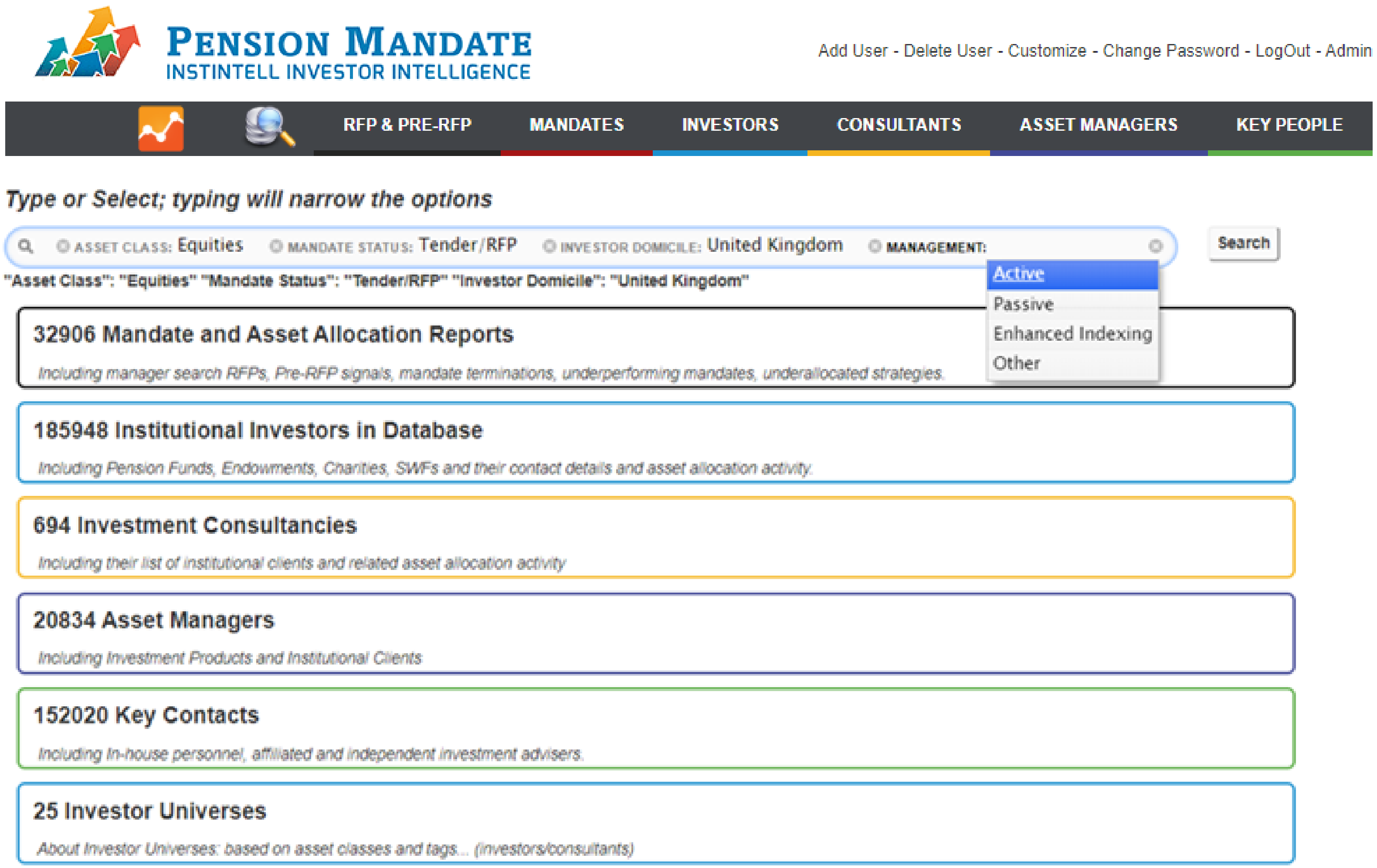
This allows you to select any combination of filters including two or more choices for each category including Asset Class, Investor Domicile, Investment Region, Mandate Status.



Searches

"I would like to know if I will make a search using your dashboard, I will find all the information I need with one single search. For example I am interested in Active Equities RFPs, from UK".

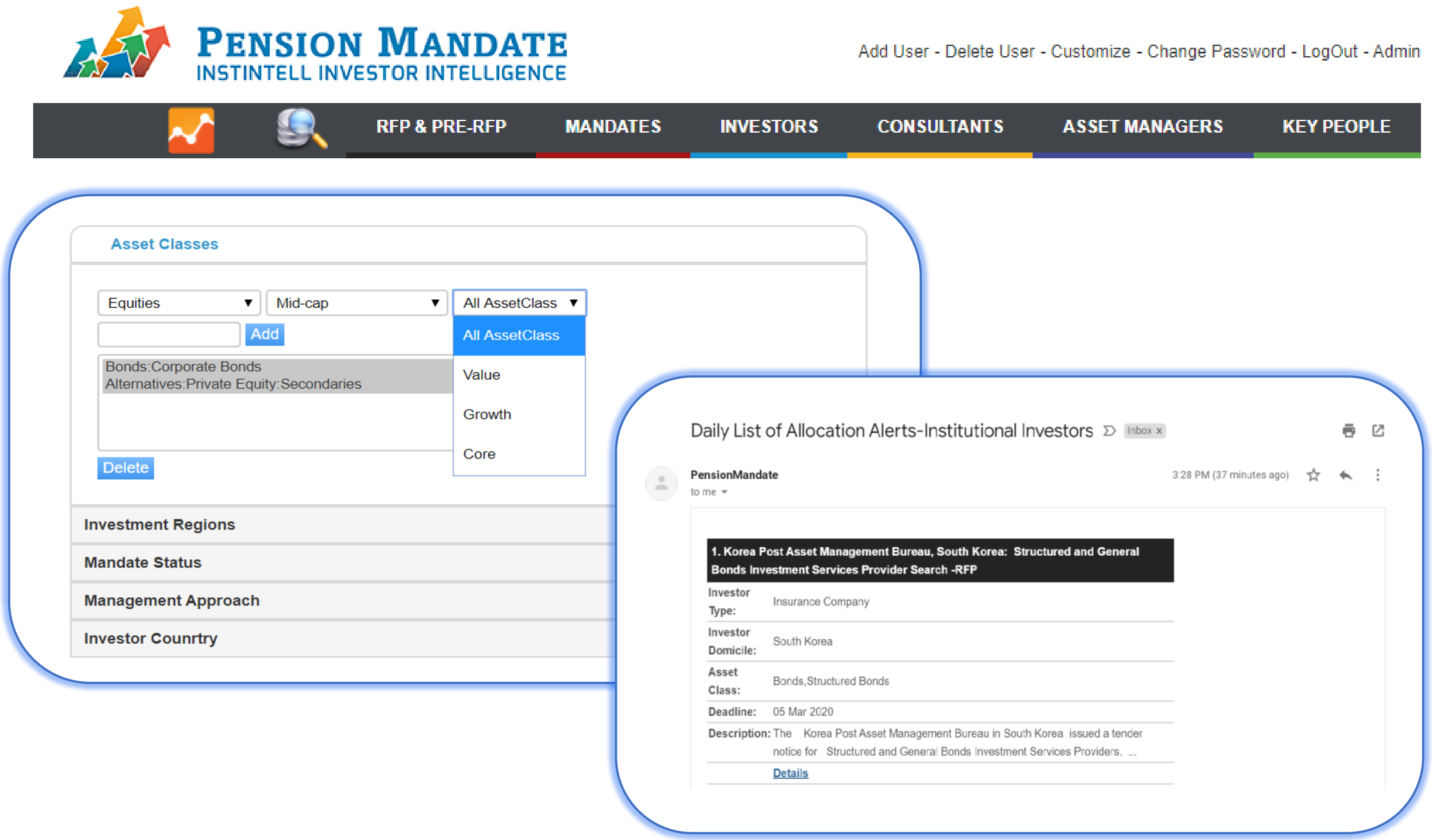
Yes, using PansionMandate's dashboard, you will be able to select the asset class that you need, also the mandate status, the investor domicile and the management status. The selection will generate a list of RFPs containing equity.



Customization

You can customize the content you receive by geography, asset class, mandate status.

We deliver the leads in real-time via email and online, everything in one place via our platform.



Leads
Statistics

To see more mandate lead samples, access the dedicated document via LINK.

To see more database content samples besides the mandate leads, continue to the below pages.

Fund Manager Search and Asset Allocation Activity July 2018-July 2019

Reports	RFPs	Potentials	Completed	Total (+ Other)
Equities	233	93	267	1367
Bonds	242	170	151	748
Real Estate	76	144	294	600
Multi-Asset	141	42	75	308
Alternatives	138	528	1171	2082
Total (+Other)	1060	1127	2145	6000

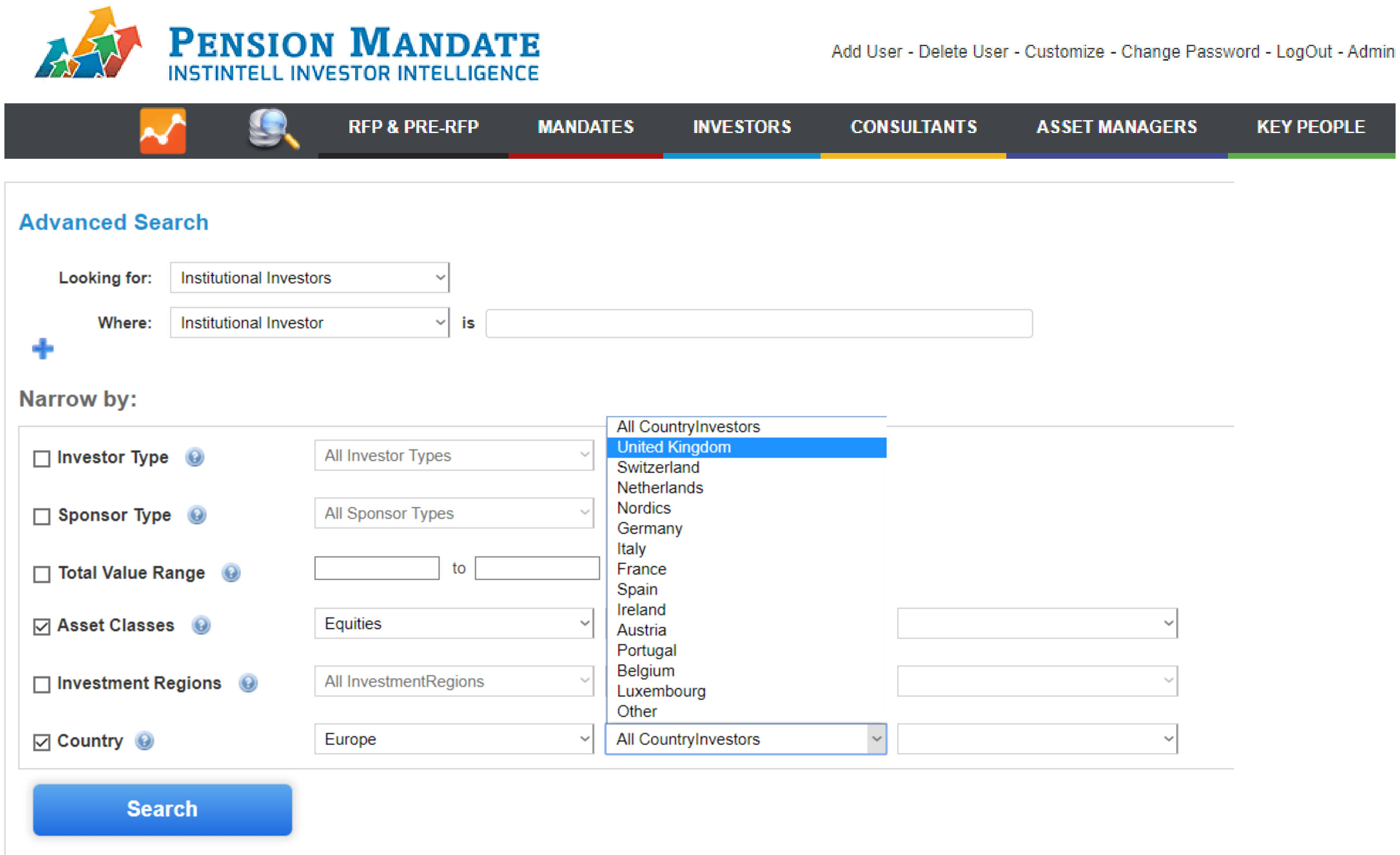
Investors

Example A1

Asset class: Equities
Investor Domicile: UK

"I am an Institutional Marketing Director with an Equity Fund Manager and I want to know a list of UK Institutional Investors allocating to Equities."

PensionMandate offers an advanced tool helping to customize your search by different factors including geography, asset class, investor type.



Investors

Example A2

Asset class: Equities
Investor Domicile: UK

The list of relevant investors is displayed online, page by page and can be exported in Excel.

PENSION MANDATE
INSTINTELL INVESTOR INTELLIGENCE

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RFP & PRE-RFP | MANDATES | INVESTORS | CONSULTANTS | ASSET MANAGERS | KEY PEOPLE

Institutional Investor Name	Value(€ million)	Investor Type	Country	Edit
St. James's Place	117990	Other:	United Kingdom	
Universities Superannuation Scheme (USS)	76836	Pension Fund	United Kingdom	
British Telecommunications Pension Scheme	56430	Pension Fund	United Kingdom	
Northern LGPS	52440	Other:	United Kingdom	
Border to Coast Pensions Partnership (BCPP)	52440	Pension Fund	United Kingdom	
Royal Bank of Scotland Group Plc. Staff Pension Scheme	51300	Pension Fund	United Kingdom	
ACCESS Pool	46740	Pension Fund	United Kingdom	
Railways Pension Scheme	31920	Pension Fund	United Kingdom	
Pension Protection Fund	31920	Pension Fund	United Kingdom	
Barclays Bank UK Retirement Fund	31920	Pension Fund	United Kingdom	
Brunel Pension Partnership (Brunel)	31920	Pension Fund	United Kingdom	
HSBC Bank UK Pension Scheme	31661.22	Pension Fund	United Kingdom	
BP Pension Fund	27360	Pension Fund	United Kingdom	
Strathclyde Pension Fund	26448	Pension Fund	United Kingdom	
BAE Systems Pension Scheme	22800	Pension Fund	United Kingdom	
LGPS Central Limited	22800	Other:	United Kingdom	

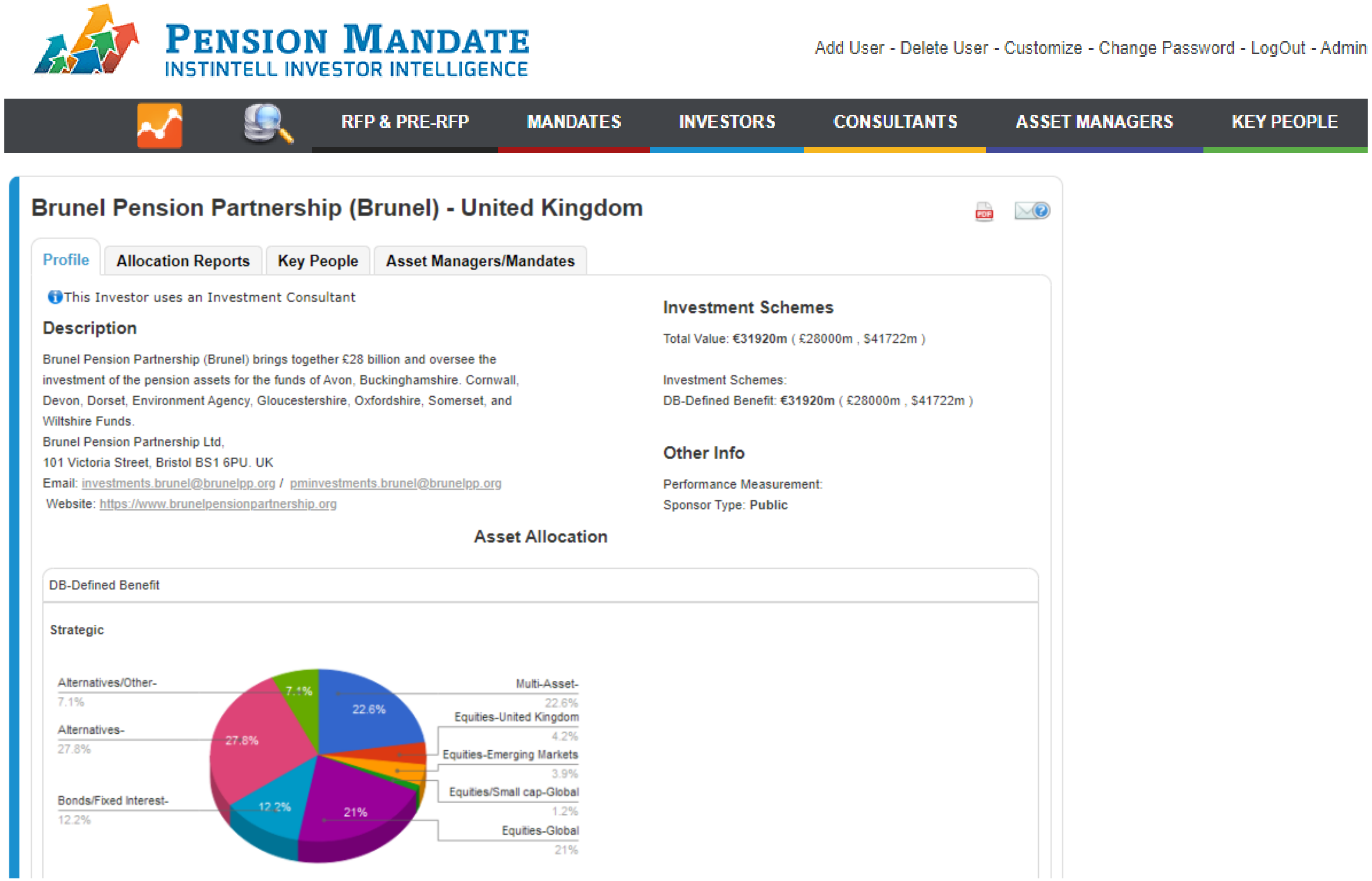
Investors

Example A3

Asset class: Equities
Investor Domicile: UK

You can click on the linked name of each institutional investor in order to see its detailed profile.

You can export the profile in PDF and also access every tab of the investor profile.



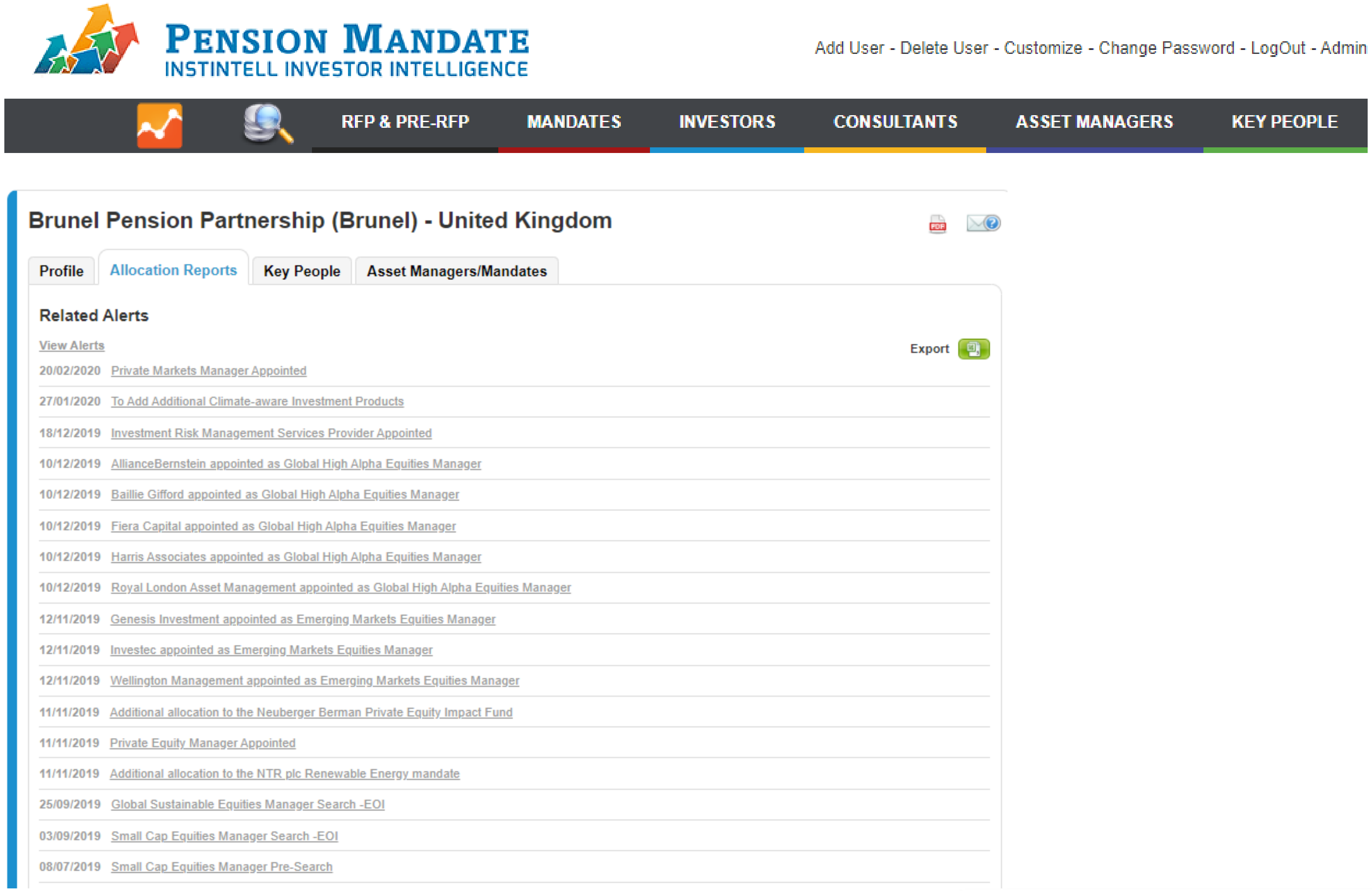
Investors

Example A4

You will be able to see all the allocation reports(including RFPs) related to a specific investor.

By clicking on the linked title, you will be able to see the report in detail.

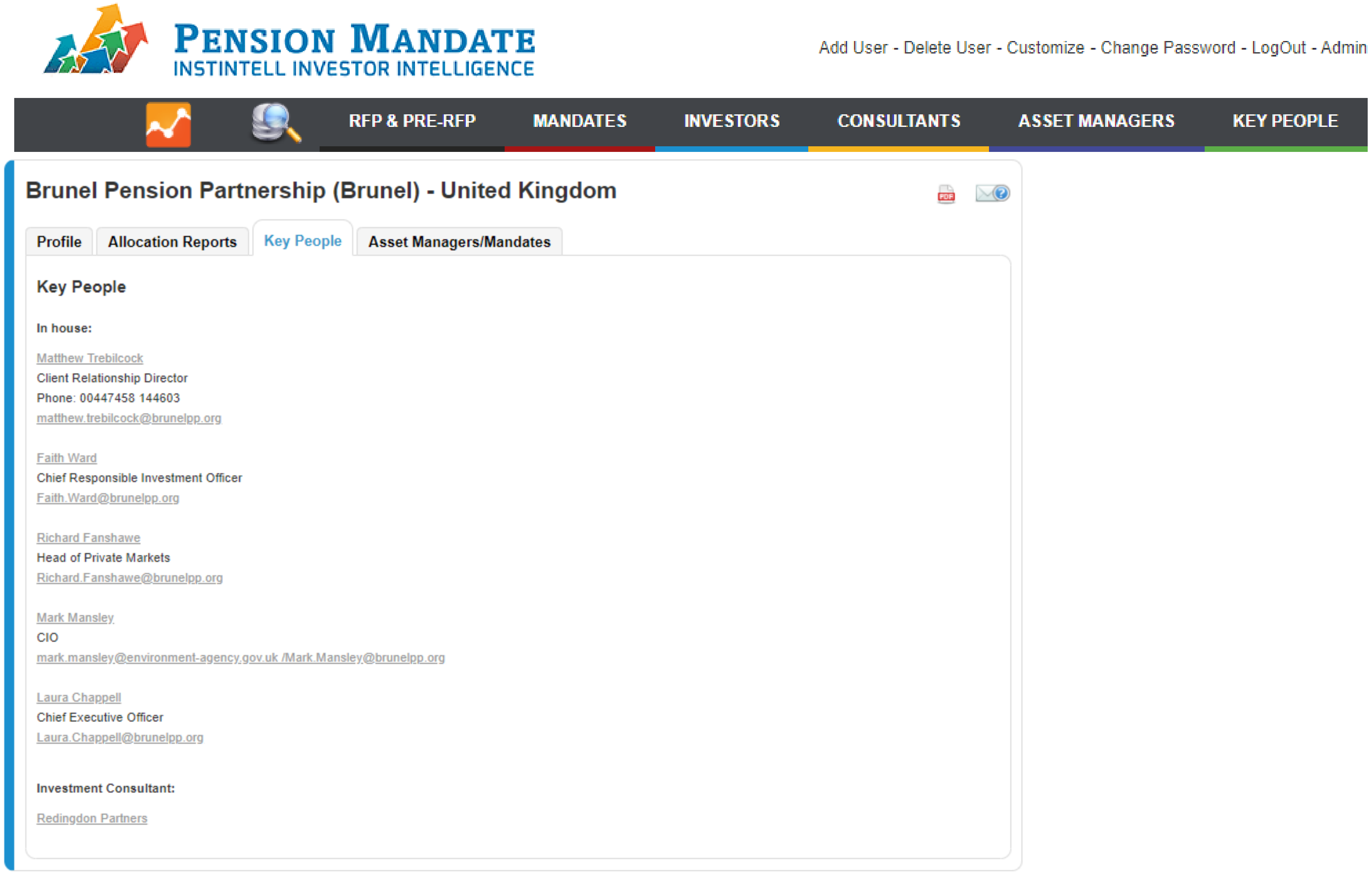
You can also export in Excel the list of reports.



Investors

Example A5

We have created a dedicated tab for Key People including the in-house personnel and external advisors.



Investors

Example A6

Another tab will display the mandates of the investors including the names of its external managers.

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INSTINTELL INVESTOR INTELLIGENCE

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RFP & PRE-RFP | MANDATES | INVESTORS | CONSULTANTS | ASSET MANAGERS | KEY PEOPLE

Mandates - Brunel Pension Partnership (Brunel)

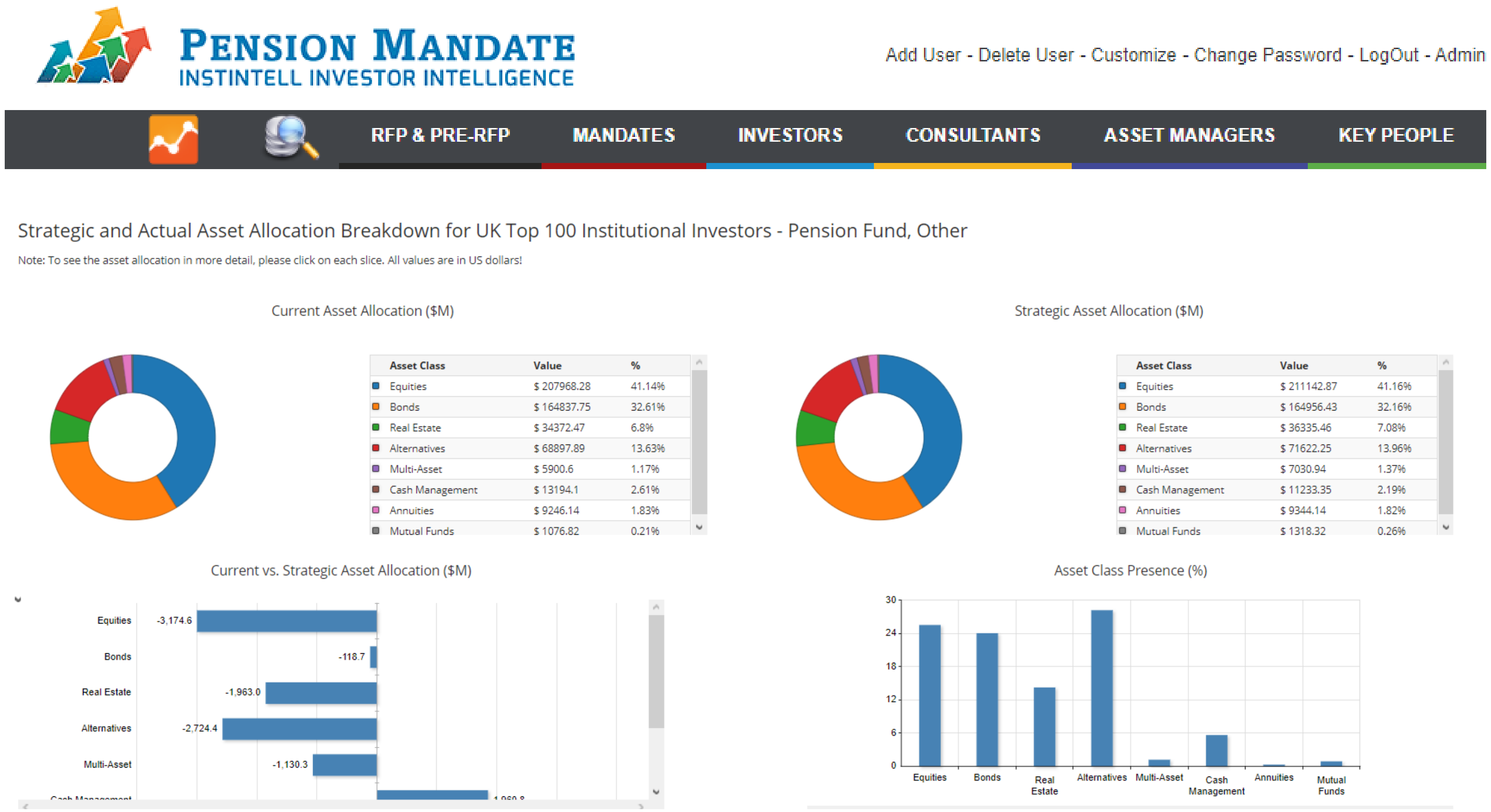
Export

RFP | Potential | Under Review | Terminated | Completed | Underperforming | To Expire

	Institutional Investor Name	Asset Manager Name	Asset Classes	Investment Region	% of Assets	Value(€)	Style	Edit
RFP	Brunel Pension Partnership (Brunel)	To be determined Deadline: 25/01/2019	Equities	Emerging Markets		GBP500m		
C	Brunel Pension Partnership (Brunel) DB-Defined Benefit	To be determined	Equities	Emerging Markets				
RFP	Brunel Pension Partnership (Brunel) DB-Defined Benefit	To be determined Deadline: 26/04/2019	Alternatives, Diversified Growth Fund			GBP2000m		
C	Brunel Pension Partnership (Brunel) DB-Defined Benefit	Robeco	Equities, Low Volatility	Global				
C	Brunel Pension Partnership (Brunel) DB-Defined Benefit	Wellington Management International Limited	Equities	Emerging Markets				
C	Brunel Pension Partnership (Brunel) DB-Defined Benefit	Baillie Gifford & Co.	Equities	Global				
C	Brunel Pension Partnership (Brunel)	Greencoat Capital	Alternatives, Private Markets,					

Investors
Analytics

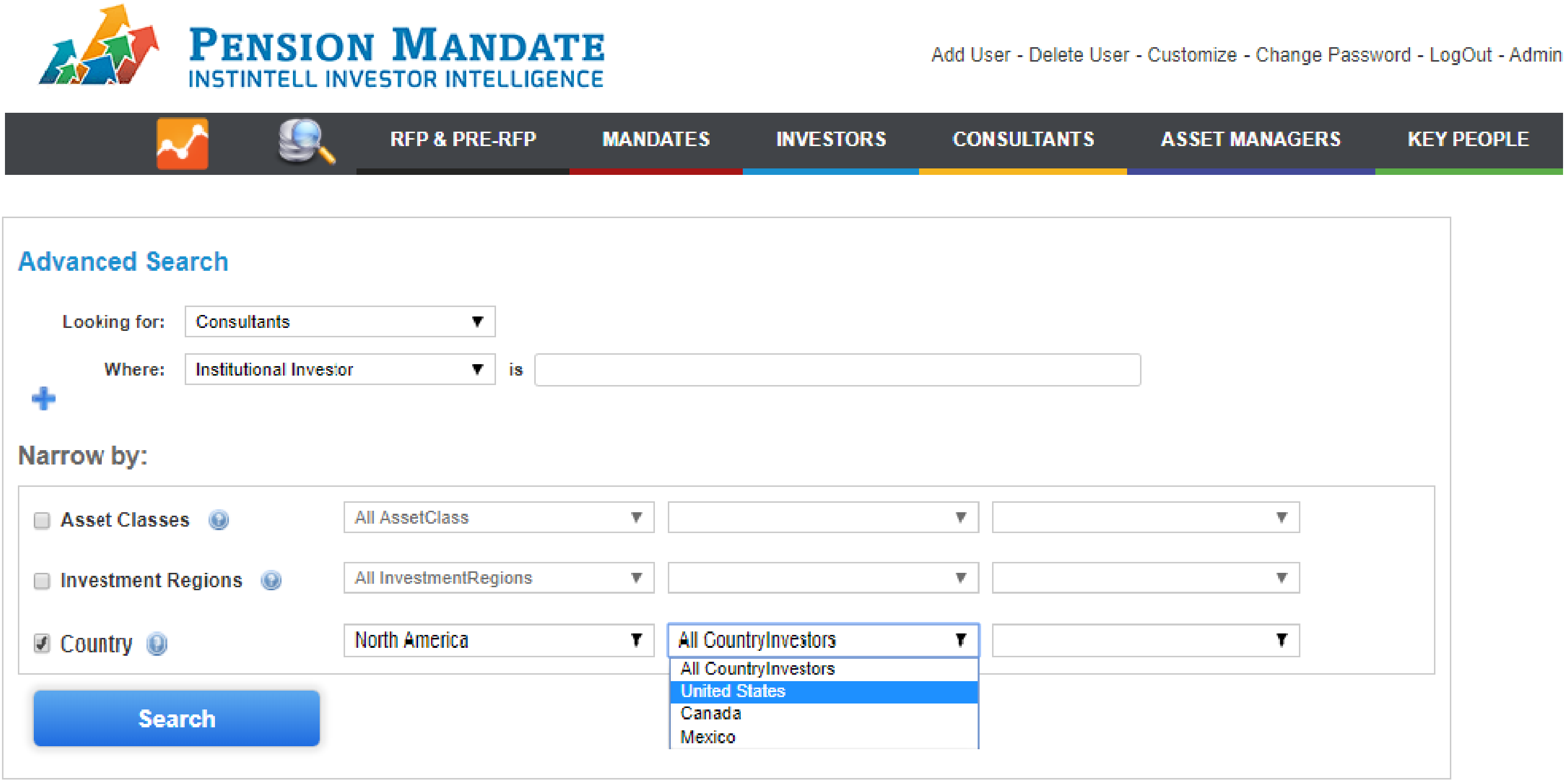
One of the advantage of having large amounts of accumulated data is that we can generate statistics about investment trends and patterns by investor group, size, consultant etc.



Consultants

Example B1

"I travel to some cities in the United States. I need a list of potential investment consultants to visit."



Besides the investor section, PensionMandate also delivers information about investment consultants.

Elastic or advanced searches in the dedicated section of our database will offer access to a relevant list of investment consultants.

Consultants

Example B2

The list of relevant investment consultant is displayed online, page by page and can be exported in Excel.

PENSION MANDATE
INSTINTELL INVESTOR INTELLIGENCE

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RFP & PRE-RFP | MANDATES | INVESTORS | CONSULTANTS | ASSET MANAGERS | KEY PEOPLE

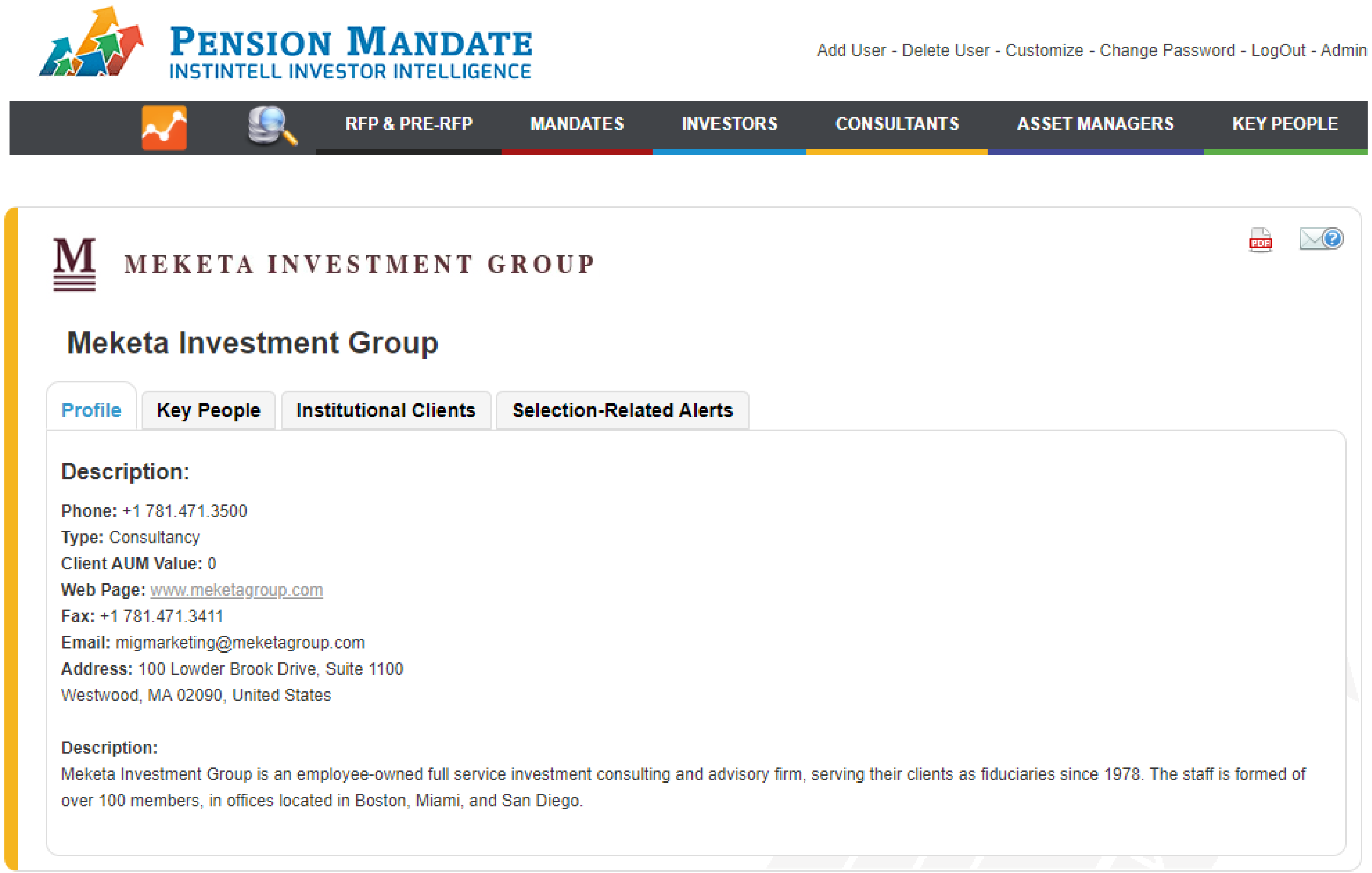
Consultants	Type	Country	City	Edit
AndCo Consulting (The Bogdahn Group)	Consultancy	United States	Orlando	
Aon Hewitt Investment Consulting US	Consultancy	United States	Chicago	
Asset Strategy Consultants	Consultancy	United States		
Bolton Partners Investment Consulting Group, Inc.	Consultancy	United States	Blue Bell	
Burgess Chambers & Associates (BCA)	Consultancy	United States	Orlando	
Fiduciary Investment Advisors	Consultancy	United States	Windsor, CT 06095	
Hamilton Lane	Consultancy	United States	Philadelphia	
Hogan Hansen	Consultancy	United States	Cedar Rapids, IA 52402-4800	
Marquette Associates	Consultancy	United States	Chicago	
Meketa Investment Group	Consultancy	United States	Westwood, MA 02090	
Mercer Investment Consulting US	Consultancy	United States	New York	
Milliman US, San Diego	Consultancy	United States	San Diego	
New England Pension Consultants(NEPC)	Consultancy	United States	Boston	
Northern Trust Investment Advisory	Consultancy	United States	Boston	
ORG Portfolio Management	Consultancy	United States	Cleveland	
PNC Institutional Advisory Solutions	Consultancy	United States	New York	

Consultants

Example B3

You can click on the linked name of each investment consultant in order to see its detailed profile.

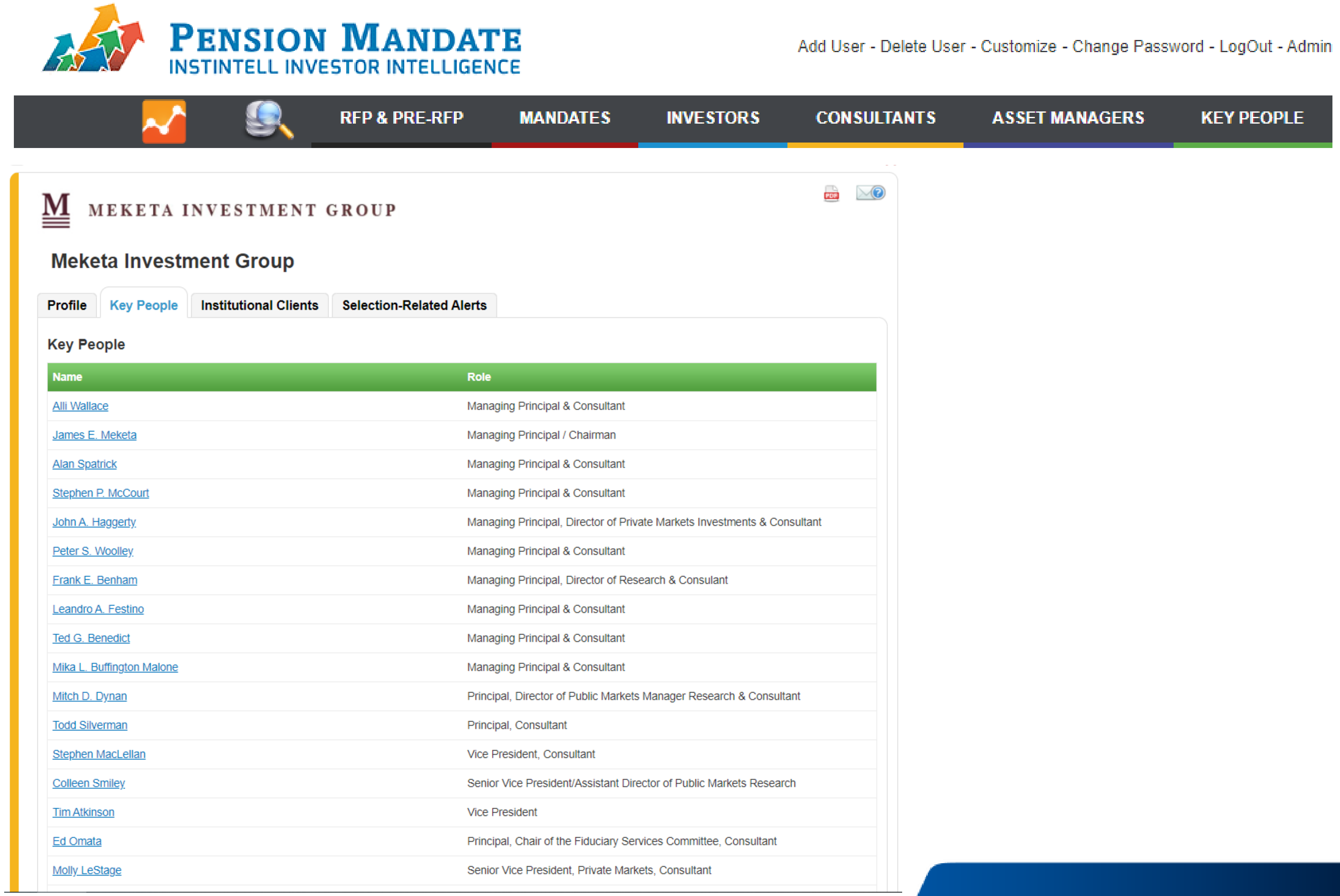
You can export the profile in PDF and access every tab of the consultant profile.



Consultants

Example B4

You can access the Key People tab in order to see relevant staff at each investment consultant.



PENSION MANDATE
INSTINTELL INVESTOR INTELLIGENCE

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RFP & PRE-RFP | MANDATES | INVESTORS | CONSULTANTS | ASSET MANAGERS | KEY PEOPLE

MEKETA INVESTMENT GROUP

Meketa Investment Group

Profile | Key People | Institutional Clients | Selection-Related Alerts

Key People

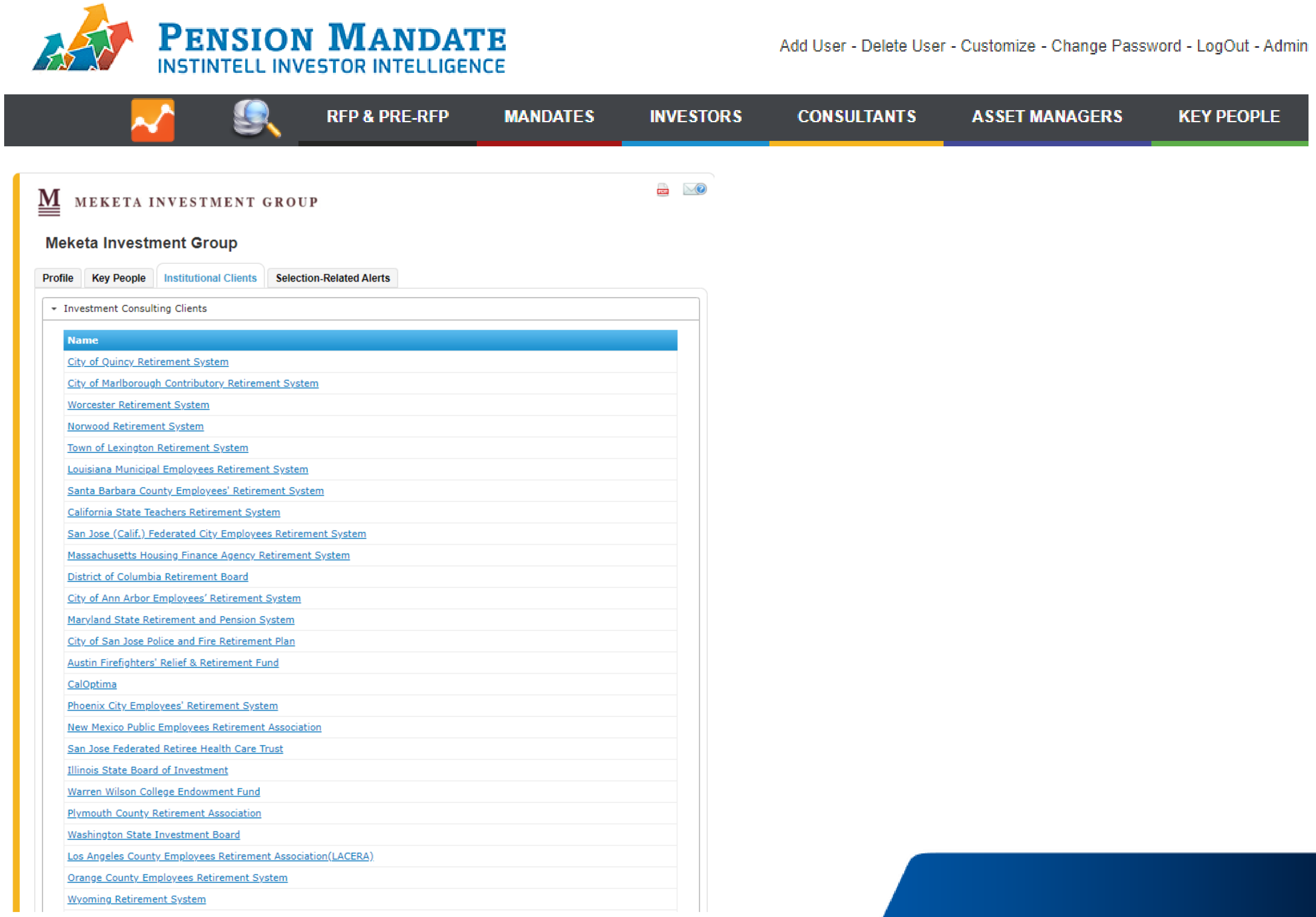
Name	Role
Alli Wallace	Managing Principal & Consultant
James E. Meketa	Managing Principal / Chairman
Alan Spatrick	Managing Principal & Consultant
Stephen P. McCourt	Managing Principal & Consultant
John A. Haggerty	Managing Principal, Director of Private Markets Investments & Consultant
Peter S. Woolley	Managing Principal & Consultant
Frank E. Benham	Managing Principal, Director of Research & Consulant
Leandro A. Festino	Managing Principal & Consultant
Ted G. Benedict	Managing Principal & Consultant
Mika L. Buffington Malone	Managing Principal & Consultant
Mitch D. Dynan	Principal, Director of Public Markets Manager Research & Consultant
Todd Silverman	Principal, Consultant
Stephen MacLellan	Vice President, Consultant
Colleen Smiley	Senior Vice President/Assistant Director of Public Markets Research
Tim Atkinson	Vice President
Ed Omata	Principal, Chair of the Fiduciary Services Committee, Consultant
Molly LeStage	Senior Vice President, Private Markets, Consultant

PENSION MANDATE
Institutional Investor Intelligence

Consultants

Example B5

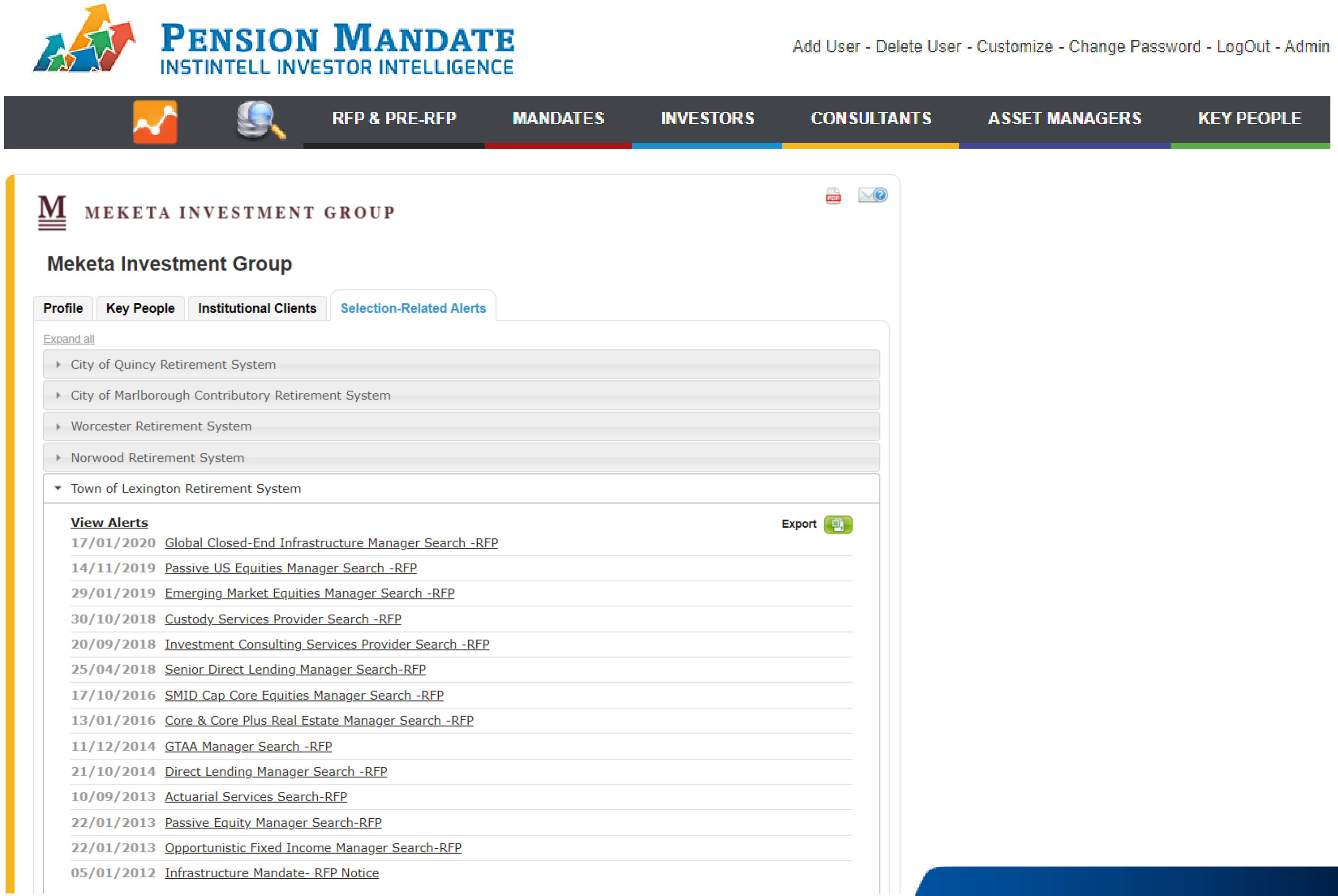
We have created a tab showing the list of institutional clients of each consultant. You can click on each name to see the investor profile in detail.



Consultants

Example B6

One of the tabs displays information about selection-related events at each institutional investor.



Consultants
Analytics

Based on our accumulated data, you can see how a certain investment consultant's clients invest and allocate to each asset class.

This offers the opportunity to identify differences between investor groups and see the biases influenced by the consultant.

PENSION MANDATE
INSTINTELL INVESTOR INTELLIGENCE

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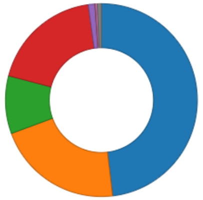
RFP & PRE-RFP | MANDATES | INVESTORS | CONSULTANTS | ASSET MANAGERS | KEY PEOPLE

Strategic and Actual Asset Allocation Breakdown for Meketa Investment Group Institutional Investors - Pension Fund, Other

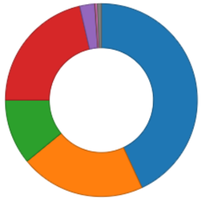
Note: To see the asset allocation in more detail, please click on each slice. All values are in US dollars!

Current Asset Allocation ($M)



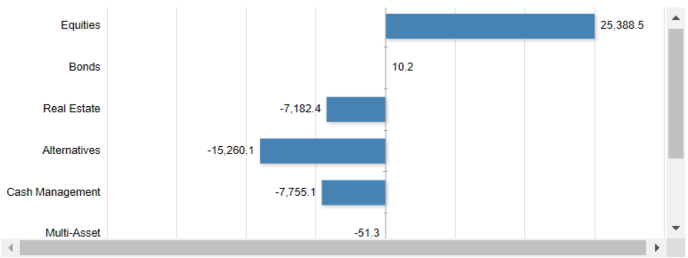
Asset Class	Value	%
Equities	$ 260441.59	48.14%
Bonds	$ 114912.56	21.24%
Real Estate	$ 52450.35	9.7%
Alternatives	$ 101300.19	18.72%
Cash Management	$ 6045.61	1.12%
Multi-Asset	$ 606.58	0.11%
Mutual Funds	$ 1538.17	0.28%
Fixed Income	$ 3701.4	0.68%

Strategic Asset Allocation ($M)

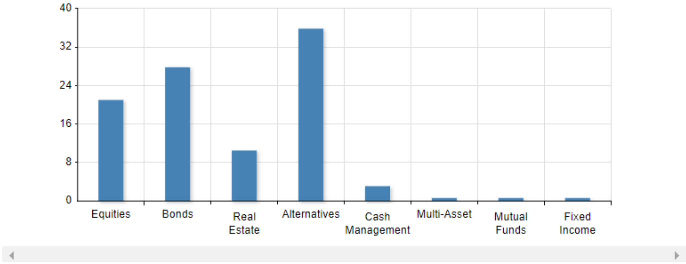


Asset Class	Value	%
Equities	$ 235053.14	43.05%
Bonds	$ 114902.41	21.04%
Real Estate	$ 59632.78	10.92%
Alternatives	$ 116560.29	21.35%
Cash Management	$ 13800.75	2.53%
Multi-Asset	$ 657.9	0.12%
Mutual Funds	$ 1710.54	0.31%
Fixed Income	$ 3651.04	0.67%

Current vs. Strategic Asset Allocation ($M)



Asset Class Presence (%)

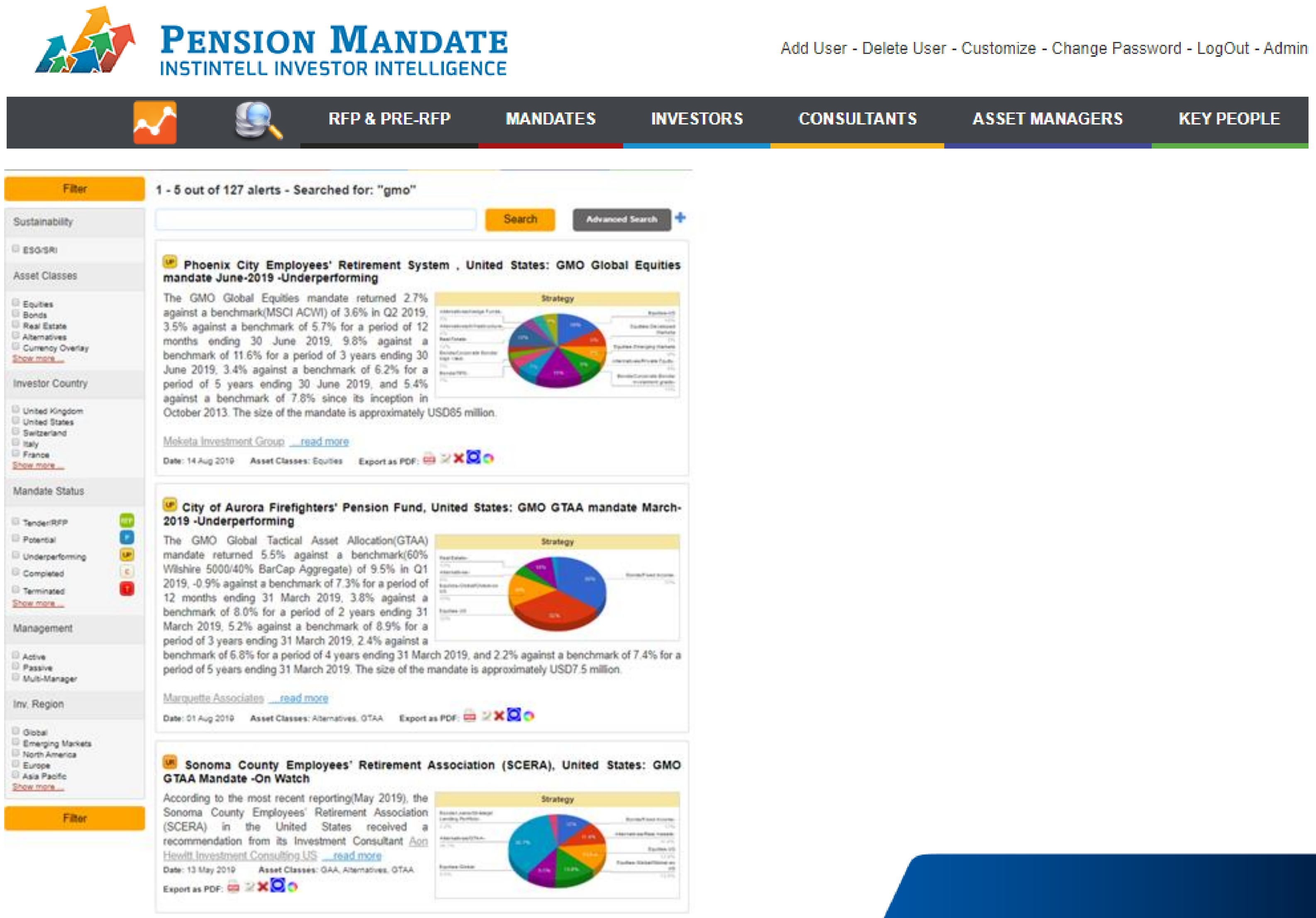


Managers

Example C1

"One of my competitors is GMO. Can I see more information about their mandates?"

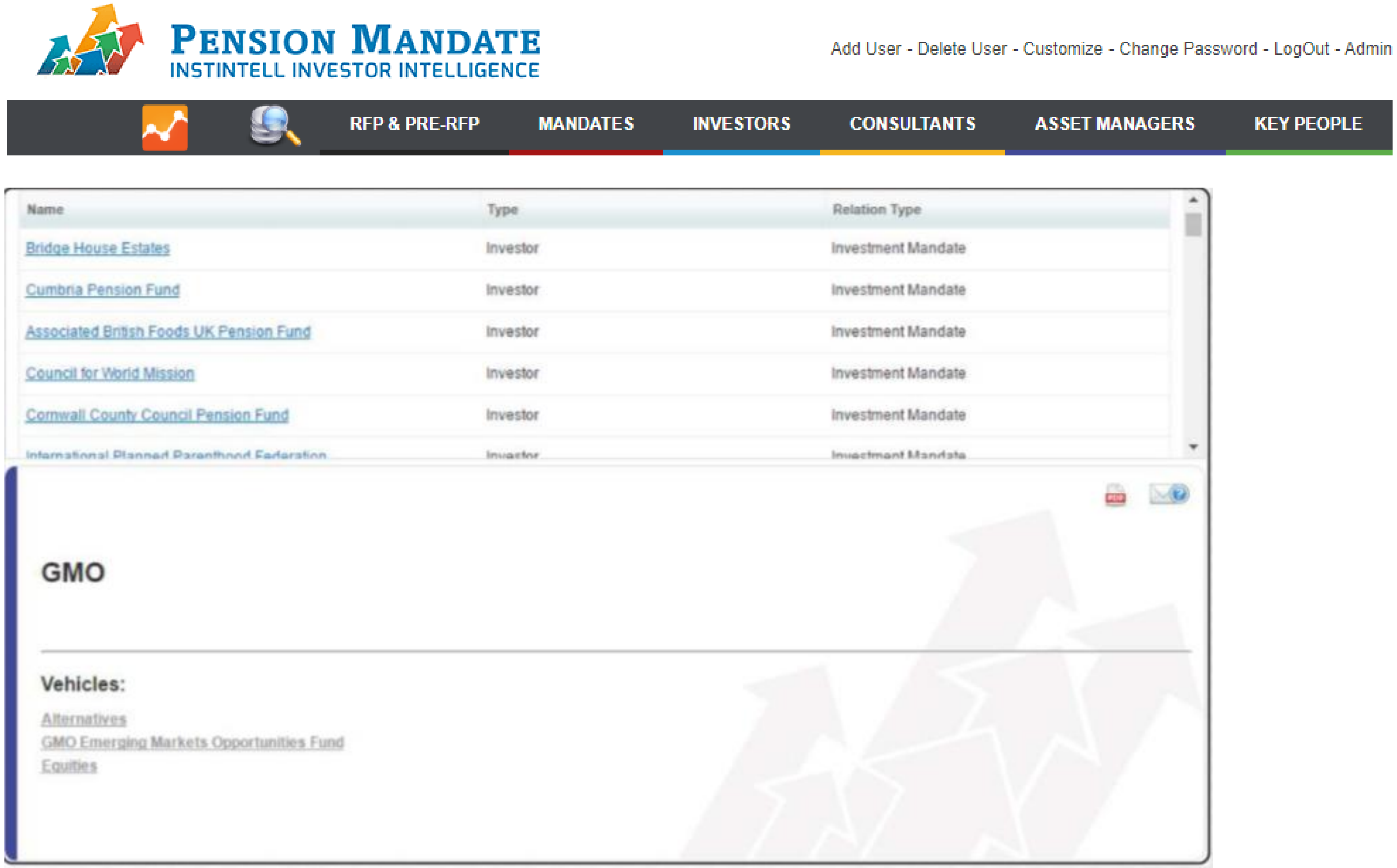
Based on accumulated data, PensionMandate offers information about mandates and their managers. It is possible to see the managers. It is possible to see the mandate activity related to a certain asset manager.



Managers

Example C2

Our historical information allows you to see a list of current mandates of a certain asset manager.



Contact

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