



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

Consultants	Type	Country	City
Frontier Advisors Pty Ltd	Consultancy	Australia	Melbourne
Hamish Wilson	Consultancy	United Kingdom	Surrey
1875 Finance SA	Consultancy	Switzerland	Geneva
3D Global	Consultancy	Cyprus	Cyprus
ACCESS PARTNERS	Consultancy	Sweden	Stockholm

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.



Add User - Delete User - Customize - Change Password - LogOut - Admin



Type or Select; typing will narrow the options

Q ASSET CLASS: Equities ASSET CLASS: Bonds ASSET CLASS: Private Equity INVESTOR DOMICILE: France Search

INVESTOR DOMICILE: Italy INVESTOR DOMICILE: Germany MANDATE STATUS: Tender/RFP

Potential
Under Review
Termination
Completed
Underperforming
To Expire

32910 Mandate and Asset Allocation Reports
Including manager search RFPs, Pre-RFP signals, mandate terminations, underperforming, completed strategies.

185948 Institutional Investors in Database
Including Pension Funds, Endowments, Charities, SWFs and their contact details and asset allocation activity.

694 Investment Consultancies
Including their list of institutional clients and related asset allocation activity.

20834 Asset Managers
Including Investment Products and Institutional Clients.

152020 Key Contacts
Including in-house personnel, affiliated and independent investment advisers.

25 Investor Universes
About Investor Universes: based on asset classes and tags... (investors/consultants)

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.

The screenshot shows the Pension Mandate dashboard with the following elements:

- Logo:** PENSION MANDATE INSTINTELL INVESTOR INTELLIGENCE
- Navigation:** Add User - Delete User - Customize - Change Password - LogOut - Admin
- Menu:** RFP & PRE-RFP, MANDATES, INVESTORS, CONSULTANTS, ASSET MANAGERS, KEY PEOPLE
- Search Bar:** Type or Select; typing will narrow the options. Search criteria: ASSET CLASS: Equities, MANDATE STATUS: Tender/RFP, INVESTOR DOMICILE: United Kingdom, MANAGEMENT: Active. Search button.
- Search Results:**
 - 32906 Mandate and Asset Allocation Reports**
Including manager search RFPs, Pre-RFP signals, mandate terminations, underperforming mandates, underallocated strategies.
 - 185948 Institutional Investors in Database**
Including Pension Funds, Endowments, Charities, SWFs and their contact details and asset allocation activity.
 - 694 Investment Consultancies**
Including their list of institutional clients and related asset allocation activity
 - 20834 Asset Managers**
Including Investment Products and Institutional Clients
 - 152020 Key Contacts**
Including In-house personnel, affiliated and independent investment advisers.
 - 25 Investor Universes**
About Investor Universes: based on asset classes and tags... (investors/consultants)

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.



Asset Classes

Equities ▼ Mid-cap ▼ All AssetClass ▼

Add

Bonds: Corporate Bonds
Alternatives: Private Equity: Secondaries

Delete

All AssetClass
Value
Growth
Core

Investment Regions

Mandate Status

Management Approach

Investor Country

Daily List of Allocation Alerts-Institutional Investors Inbox x

PensionMandate
to me 3:28 PM (37 minutes ago) ☆ ↶ ⋮

1. Korea Post Asset Management Bureau, South Korea: Structured and General Bonds Investment Services Provider Search -RFP

Investor Type: Insurance Company

Investor Domicile: South Korea

Asset Class: Bonds, Structured Bonds

Deadline: 05 Mar 2020

Description: The Korea Post Asset Management Bureau in South Korea issued a tender notice for Structured and General Bonds Investment Services Providers. ...

[Details](#)



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.



Add User - Delete User - Customize - Change Password - LogOut - Admin



Advanced Search

Looking for: Institutional Investors
Where: Institutional Investor is

Narrow by:

<input type="checkbox"/> Investor Type	All Investor Types	All CountryInvestors United Kingdom Switzerland Netherlands Nordics Germany Italy France Spain Ireland Austria Portugal Belgium Luxembourg Other	
<input type="checkbox"/> Sponsor Type	All Sponsor Types		
<input type="checkbox"/> Total Value Range	to		
<input checked="" type="checkbox"/> Asset Classes	Equities		
<input type="checkbox"/> Investment Regions	All InvestmentRegions		
<input checked="" type="checkbox"/> Country	Europe		

Search

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

Add User - Delete User - Customize - Change Password - LogOut - Admin



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	



PENSION MANDATE
Institutional Investor Intelligence

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.

Brunel Pension Partnership (Brunel) - United Kingdom

[Profile](#) [Allocation Reports](#) [Key People](#) [Asset Managers/Mandates](#)

 This Investor uses an Investment Consultant

Description

Brunel Pension Partnership (Brunel) brings together £28 billion and oversee the investment of the pension assets for the funds of Avon, Buckinghamshire, Cornwall, Devon, Dorset, Environment Agency, Gloucestershire, Oxfordshire, Somerset, and Wiltshire Funds.

Brunel Pension Partnership Ltd,
101 Victoria Street, Bristol BS1 6PU, UK

Email: investments.brunel@brunelpp.org / pminvestments.brunel@brunelpp.org

Website: <https://www.brunelpensionpartnership.org>

Investment Schemes

Total Value: €31920m (£28000m , \$41722m)

Investment Schemes:

DB-Defined Benefit: €31920m (£28000m , \$41722m)

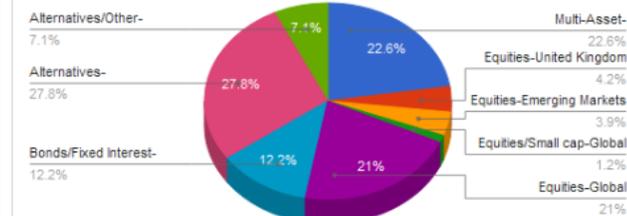
Other Info

Performance Measurement:
Sponsor Type: Public

Asset Allocation

DB-Defined Benefit

Strategic



Investors

Example A4



RFP & PRE-RFP

MANDATES

INVESTORS

CONSULTANTS

ASSET MANAGERS

KEY PEOPLE

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.

Brunel Pension Partnership (Brunel) - United Kingdom



Profile Allocation Reports Key People Asset Managers/Mandates

Related Alerts

[View Alerts](#)

Export 

20/02/2020 [Private Markets Manager Appointed](#)

27/01/2020 [To Add Additional Climate-aware Investment Products](#)

18/12/2019 [Investment Risk Management Services Provider Appointed](#)

10/12/2019 [AllianceBernstein appointed as Global High Alpha Equities Manager](#)

10/12/2019 [Baillie Gifford appointed as Global High Alpha Equities Manager](#)

10/12/2019 [Fiera Capital appointed as Global High Alpha Equities Manager](#)

10/12/2019 [Harris Associates appointed as Global High Alpha Equities Manager](#)

10/12/2019 [Royal London Asset Management appointed as Global High Alpha Equities Manager](#)

12/11/2019 [Genesis Investment appointed as Emerging Markets Equities Manager](#)

12/11/2019 [Investec appointed as Emerging Markets Equities Manager](#)

12/11/2019 [Wellington Management appointed as Emerging Markets Equities Manager](#)

11/11/2019 [Additional allocation to the Neuberger Berman Private Equity Impact Fund](#)

11/11/2019 [Private Equity Manager Appointed](#)

11/11/2019 [Additional allocation to the NTR plc Renewable Energy mandate](#)

25/09/2019 [Global Sustainable Equities Manager Search -EOI](#)

03/09/2019 [Small Cap Equities Manager Search -EOI](#)

08/07/2019 [Small Cap Equities Manager Pre-Search](#)



Investors

Example A5

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

The screenshot displays the Pension Mandate web application interface. At the top, the logo for Pension Mandate (Instintell Investor Intelligence) is visible, along with a navigation menu containing: Add User - Delete User - Customize - Change Password - LogOut - Admin. Below the navigation bar, a dark header contains icons for RFP & PRE-RFP, MANDATES, INVESTORS, CONSULTANTS, ASSET MANAGERS, and KEY PEOPLE. The main content area is titled "Brunel Pension Partnership (Brunel) - United Kingdom" and features a tabbed interface with "Key People" selected. The "Key People" section lists the following individuals and their roles:

- In house:**
 - [Matthew Trebilcock](#)
Client Relationship Director
Phone: 00447458 144603
matthew.trebilcock@brunelpp.org
 - [Faith Ward](#)
Chief Responsible Investment Officer
Faith.Ward@brunelpp.org
 - [Richard Fanshawe](#)
Head of Private Markets
Richard.Fanshawe@brunelpp.org
 - [Mark Mansley](#)
CIO
mark.mansley@environment-agency.gov.uk / Mark.Mansley@brunelpp.org
 - [Laura Chappell](#)
Chief Executive Officer
Laura.Chappell@brunelpp.org
- Investment Consultant:**
 - [Redingdon Partners](#)

Investors

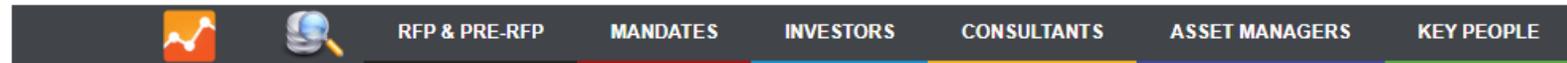
Example A6

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



PENSION MANDATE
INSTINTELL INVESTOR INTELLIGENCE

Add User - Delete User - Customize - Change Password - LogOut - Admin



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,					



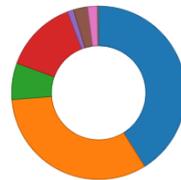
PENSION MANDATE
Institutional Investor Intelligence

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.

Strategic and Actual Asset Allocation Breakdown for UK Top 100 Institutional Investors - Pension Fund, Other

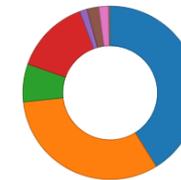
Note: To see the asset allocation in more detail, please click on each slice. All values are in US dollars!

Current Asset Allocation (\$M)



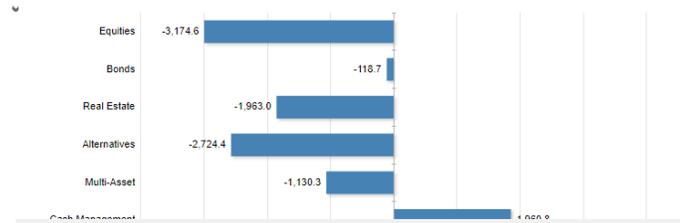
Asset Class	Value	%
Equities	\$ 207968.28	41.14%
Bonds	\$ 164837.75	32.61%
Real Estate	\$ 34372.47	6.8%
Alternatives	\$ 68897.89	13.63%
Multi-Asset	\$ 5900.6	1.17%
Cash Management	\$ 13194.1	2.61%
Annuities	\$ 9246.14	1.83%
Mutual Funds	\$ 1076.82	0.21%

Strategic Asset Allocation (\$M)

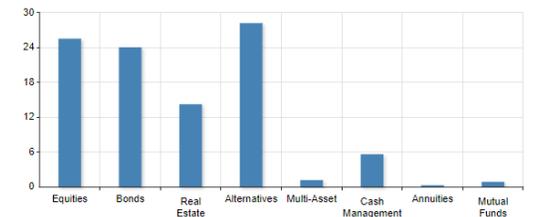


Asset Class	Value	%
Equities	\$ 211142.87	41.16%
Bonds	\$ 164956.43	32.16%
Real Estate	\$ 36335.46	7.08%
Alternatives	\$ 71622.25	13.96%
Multi-Asset	\$ 7030.94	1.37%
Cash Management	\$ 11233.35	2.19%
Annuities	\$ 9344.14	1.82%
Mutual Funds	\$ 1318.32	0.26%

Current vs. Strategic Asset Allocation (\$M)



Asset Class Presence (%)



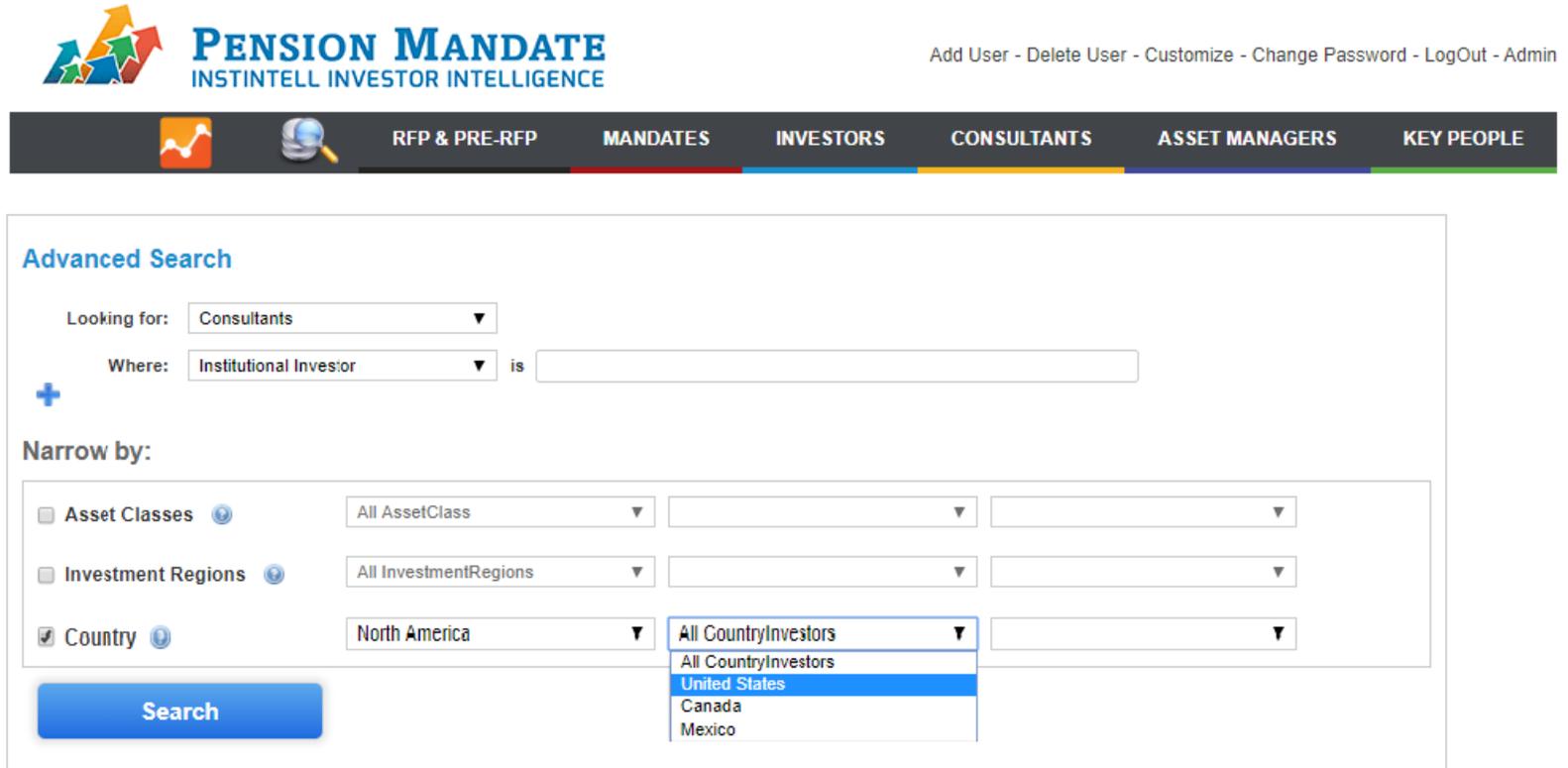
Consultants

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.



The screenshot shows the Pension Mandate website's advanced search interface. At the top, the logo for Pension Mandate (Instintell Investor Intelligence) is displayed on the left, and user management options (Add User, Delete User, Customize, Change Password, LogOut, Admin) are on the right. A navigation bar below the logo contains icons for RFP & PRE-RFP, MANDATES, INVESTORS, CONSULTANTS (highlighted), ASSET MANAGERS, and KEY PEOPLE. The main content area is titled "Advanced Search" and includes a search form with the following elements:

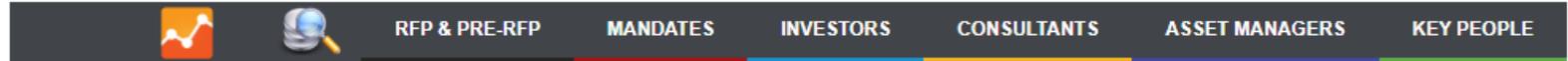
- "Looking for:" dropdown menu set to "Consultants".
- "Where:" dropdown menu set to "Institutional Investor", followed by an "is" label and an empty text input field.
- A "+" icon for adding more filters.
- "Narrow by:" section with three filter categories:
 - Asset Classes: dropdown set to "All AssetClass", with two empty text input fields.
 - Investment Regions: dropdown set to "All InvestmentRegions", with two empty text input fields.
 - Country: dropdown set to "North America", with a dropdown menu open showing "All CountryInvestors", "All CountryInvestors", "United States" (highlighted), "Canada", and "Mexico".
- A blue "Search" button.

Consultants

Example B2



Add User - Delete User - Customize - Change Password - LogOut - Admin



Consultants	Type	Country	City	Edit
AndCo Consulting (The Bogdahn Group)	Consultancy	United States	Oriando	
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	Oriando	
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 U.S. 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	

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

Consultants

Example B3



RFP & PRE-RFP

MANDATES

INVESTORS

CONSULTANTS

ASSET MANAGERS

KEY PEOPLE

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.

M MEKETA INVESTMENT GROUP



Meketa Investment Group

[Profile](#)

[Key People](#)

[Institutional Clients](#)

[Selection-Related Alerts](#)

Description:

Phone: +1 781.471.3500

Type: Consultancy

Client AUM Value: 0

Web Page: www.meketagroup.com

Fax: +1 781.471.3411

Email: migmarketing@meketagroup.com

Address: 100 Lowder Brook Drive, Suite 1100
Westwood, MA 02090, United States

Description:

Meketa Investment Group is an employee-owned full service investment consulting and advisory firm, serving their clients as fiduciaries since 1978. The staff is formed of over 100 members, in offices located in Boston, Miami, and San Diego.

Consultants

Example B4

M 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 & Consultant
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

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

Consultants

Example B5



Add User - Delete User - Customize - Change Password - LogOut - Admin



M MEKETA INVESTMENT GROUP

Meketa Investment Group

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

Investment Consulting Clients

Name
City of Quincy Retirement System
City of Marlborough Contributory Retirement System
Worcester Retirement System
Norwood Retirement System
Town of Lexington Retirement System
Louisiana Municipal Employees Retirement System
Santa Barbara County Employees' Retirement System
California State Teachers Retirement System
San Jose (Calif.) Federated City Employees Retirement System
Massachusetts Housing Finance Agency Retirement System
District of Columbia Retirement Board
City of Ann Arbor Employees' Retirement System
Maryland State Retirement and Pension System
City of San Jose Police and Fire Retirement Plan
Austin Firefighters' Relief & Retirement Fund
CalOptima
Phoenix City Employees' Retirement System
New Mexico Public Employees Retirement Association
San Jose Federated Retiree Health Care Trust
Illinois State Board of Investment
Warren Wilson College Endowment Fund
Plymouth County Retirement Association
Washington State Investment Board
Los Angeles County Employees Retirement Association(LACERA)
Orange County Employees Retirement System
Wyoming Retirement System

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



RFP & PRE-RFP

MANDATES

INVESTORS

CONSULTANTS

ASSET MANAGERS

KEY PEOPLE

M MEKETA INVESTMENT GROUP

Meketa Investment Group

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

[Expand all](#)

- ▶ City of Quincy Retirement System
- ▶ City of Marlborough Contributory Retirement System
- ▶ Worcester Retirement System
- ▶ Norwood Retirement System

▼ Town of Lexington Retirement System

View Alerts

Export 

- 17/01/2020 [Global Closed-End Infrastructure Manager Search -RFP](#)
- 14/11/2019 [Passive US Equities Manager Search -RFP](#)
- 29/01/2019 [Emerging Market Equities Manager Search -RFP](#)
- 30/10/2018 [Custody Services Provider Search -RFP](#)
- 20/09/2018 [Investment Consulting Services Provider Search -RFP](#)
- 25/04/2018 [Senior Direct Lending Manager Search-RFP](#)
- 17/10/2016 [SMID Cap Core Equities Manager Search -RFP](#)
- 13/01/2016 [Core & Core Plus Real Estate Manager Search -RFP](#)
- 11/12/2014 [GTAA Manager Search -RFP](#)
- 21/10/2014 [Direct Lending Manager Search -RFP](#)
- 10/09/2013 [Actuarial Services Search-RFP](#)
- 22/01/2013 [Passive Equity Manager Search-RFP](#)
- 22/01/2013 [Opportunistic Fixed Income Manager Search-RFP](#)
- 05/01/2012 [Infrastructure Mandate- RFP Notice](#)

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



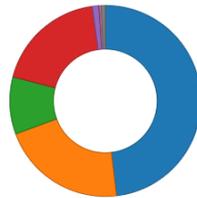
Based on our accumulated data, you can see how a certain investment consultant's clients invest and allocate to each asset class.

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

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

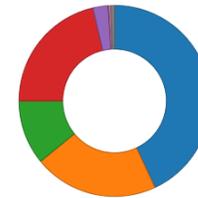
Note: To see the asset allocation in more detail, please click on each slice. All values are in US dollars!

Current Asset Allocation (\$M)



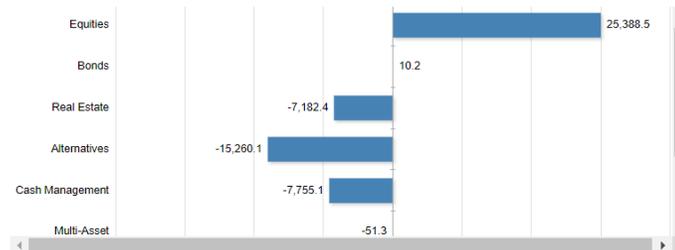
Asset Class	Value	%
Equities	\$ 260441.59	48.14%
Bonds	\$ 114912.56	21.24%
Real Estate	\$ 52450.35	9.7%
Alternatives	\$ 101300.19	18.72%
Cash Management	\$ 6045.61	1.12%
Multi-Asset	\$ 606.58	0.11%
Mutual Funds	\$ 1538.17	0.28%
Fixed Income	\$ 3701.4	0.68%

Strategic Asset Allocation (\$M)

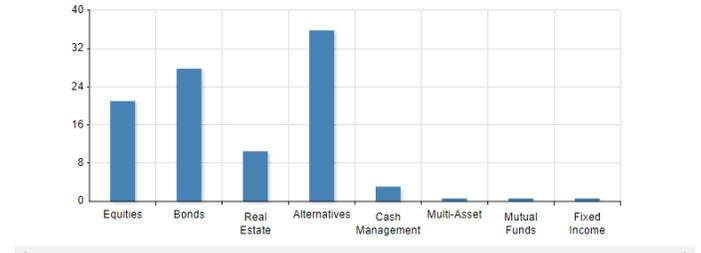


Asset Class	Value	%
Equities	\$ 235053.14	43.05%
Bonds	\$ 114902.41	21.04%
Real Estate	\$ 59632.78	10.92%
Alternatives	\$ 116560.29	21.35%
Cash Management	\$ 13800.75	2.53%
Multi-Asset	\$ 657.9	0.12%
Mutual Funds	\$ 1710.54	0.31%
Fixed Income	\$ 3651.04	0.67%

Current vs. Strategic Asset Allocation (\$M)



Asset Class Presence (%)



Managers

Example C1

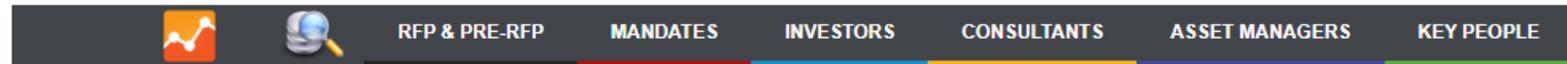
"One of my competitors is GMO.
Can I see more information about
their mandates?"

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



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Filter 1 - 5 out of 127 alerts - Searched for: "gmo"

Sustainability

Asset Classes

- Equities
- Bonds
- Real Estate
- Alternatives
- Currency Overlay

Investor Country

- United Kingdom
- United States
- Switzerland
- Italy
- France

Mandate Status

- TenderRFP
- Potential
- Underperforming
- Completed
- Terminated

Management

- Active
- Passive
- Sub-Manager

Inv. Region

- Global
- Emerging Markets
- North America
- Europe
- Asia Pacific

Phoenix City Employees' Retirement System , United States: GMO Global Equities mandate June-2019 -Underperforming

The GMO Global Equities mandate returned 2.7% against a benchmark(MSCI ACWI) of 3.6% in Q2 2019, 3.5% against a benchmark of 5.7% for a period of 12 months ending 30 June 2019, 9.8% against a benchmark of 11.6% for a period of 3 years ending 30 June 2019, 3.4% against a benchmark of 6.2% for a period of 5 years ending 30 June 2019, and 5.4% against a benchmark of 7.8% since its inception in October 2013. The size of the mandate is approximately USD65 million.

[Mokela Investment Group](#) [read more](#)

Date: 14 Aug 2019 Asset Classes: Equities Export as PDF: [PDF] [Print] [Share]

City of Aurora Firefighters' Pension Fund, United States: GMO GTAA mandate March-2019 -Underperforming

The GMO Global Tactical Asset Allocation(GTAA) mandate returned 5.5% against a benchmark(60% Wilshire 5000/40% BarCap Aggregate) of 9.5% in Q1 2019, -0.9% against a benchmark of 7.3% for a period of 12 months ending 31 March 2019, 3.8% against a benchmark of 8.0% for a period of 2 years ending 31 March 2019, 5.2% against a benchmark of 8.9% for a period of 3 years ending 31 March 2019, 2.4% against a benchmark of 6.8% for a period of 4 years ending 31 March 2019, and 2.2% against a benchmark of 7.4% for a period of 5 years ending 31 March 2019. The size of the mandate is approximately USD7.5 million.

[Marquette Associates](#) [read more](#)

Date: 01 Aug 2019 Asset Classes: Alternatives, GTAA Export as PDF: [PDF] [Print] [Share]

Sonoma County Employees' Retirement Association (SCERA), United States: GMO GTAA Mandate -On Watch

According to the most recent reporting(May 2019), the Sonoma County Employees' Retirement Association (SCERA) in the United States received a recommendation from its Investment Consultant [Hewitt Investment Consulting US](#) [read more](#)

Date: 13 May 2019 Asset Classes: GAA, Alternatives, GTAA Export as PDF: [PDF] [Print] [Share]



PENSION MANDATE
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Managers

Example C2

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



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RFP & PRE-RFP

MANDATES

INVESTORS

CONSULTANTS

ASSET MANAGERS

KEY PEOPLE

Name	Type	Relation Type
Bridge House Estates	Investor	Investment Mandate
Cumbria Pension Fund	Investor	Investment Mandate
Associated British Foods UK Pension Fund	Investor	Investment Mandate
Council for World Mission	Investor	Investment Mandate
Cornwall County Council Pension Fund	Investor	Investment Mandate
International Planned Parenthood Federation	Investor	Investment Mandate

GMO

Vehicles:

- [Alternatives](#)
- [GMO Emerging Markets Opportunities Fund](#)
- [Equities](#)



PENSION MANDATE
Institutional Investor Intelligence

Contact

Contact us:



UK +44(0) 208 144 9983

US (212) 203-0271



contact@pensionmandate.com

www.pensionmandate.com



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