



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

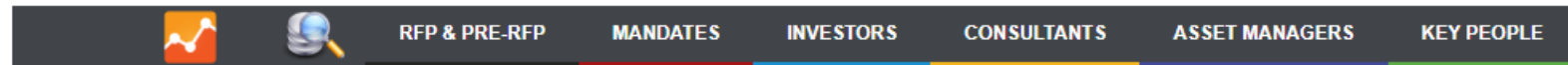
Multifarious Features

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

"Asset Class": "Equities" "Asset Class": "Bonds" "Asset Class": "Private Equity" "Investor Domicile": "France" "Investor Domicile": "Italy" "Investor Domicile": "Germany"

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)

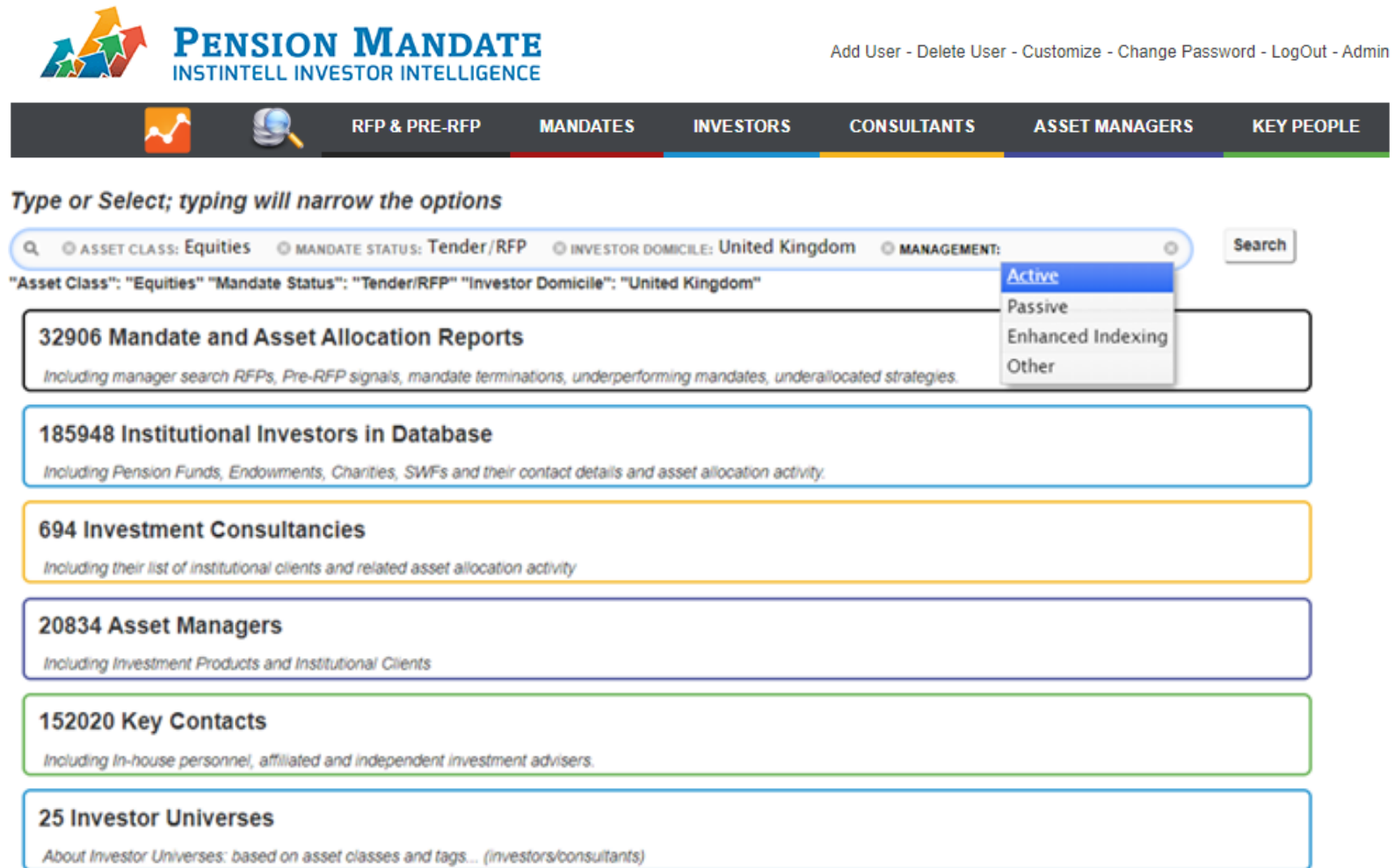


PENSION MANDATE
Institutional Investor Intelligence

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 displays the Pension Mandate dashboard search interface. At the top, the logo for Pension Mandate Institutional Investor Intelligence is shown, along with navigation links: Add User - Delete User - Customize - Change Password - LogOut - Admin. Below the logo is a navigation bar with icons and labels for RFP & PRE-RFP, MANDATES, INVESTORS, CONSULTANTS, ASSET MANAGERS, and KEY PEOPLE. The main search area features a search bar with the text "Type or Select; typing will narrow the options". The search bar contains filters: ASSET CLASS: Equities, MANDATE STATUS: Tender/RFP, INVESTOR DOMICILE: United Kingdom, and MANAGEMENT: (with a dropdown menu open showing options: Active, Passive, Enhanced Indexing, and Other). A "Search" button is located to the right of the search bar. Below the search bar, the results are displayed in a list of boxes, each with a title and a description:

- 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.

The screenshot displays the Pension Mandate platform interface. At the top, the logo "PENSION MANDATE INSTINTELL INVESTOR INTELLIGENCE" is visible, along with navigation links: "Add User - Delete User - Customize - Change Password - LogOut - Admin". Below this is a dark navigation bar with icons and labels for "RFP & PRE-RFP", "MANDATES", "INVESTORS", "CONSULTANTS", "ASSET MANAGERS", and "KEY PEOPLE".

The main content area is divided into two sections. The left section, titled "Asset Classes", features a form with dropdown menus for "Equities" and "Mid-cap", an "Add" button, and a list of asset classes: "Bonds: Corporate Bonds", "Alternatives: Private Equity: Secondaries", "Value", "Growth", and "Core". A "Delete" button is also present. Below this are tabs for "Investment Regions", "Mandate Status", "Management Approach", and "Investor Country".

The right section shows an email alert titled "Daily List of Allocation Alerts-Institutional Investors". The alert is from "PensionMandate" and contains the following details:

- 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 May 2021 - May 2022

Reports	RFPs	Potentials	Completed	Total (+ Other *)
Equities	207	106	273	666
Bonds	209	122	277	638
Real Estate	84	155	451	708
Multi-Asset	191	67	114	375
Alternatives	177	446	1921	2571
Total (+Other *)	819	837	2928	4739

* Includes underperforming, to expire, terminated mandates.



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.

**PENSION MANDATE**
INSTINTELL INVESTOR INTELLIGENCE

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RFP & PRE-RFPMANDATESINVESTORSCONSULTANTSASSET MANAGERSKEY PEOPLE

Advanced Search

Looking for: Institutional Investors

+Where: Institutional Investor is

Narrow by:

☐ Investor Type ⓘ

All Investor Types

☐ Sponsor Type ⓘ

All Sponsor Types

☐ Total Value Range ⓘ

to

☒ Asset Classes ⓘ

Equities

☐ Investment Regions ⓘ

All InvestmentRegions

☒ Country ⓘ

Europe

All CountryInvestors
United Kingdom
Switzerland
Netherlands
Nordics
Germany
Italy
France
Spain
Ireland
Austria
Portugal
Belgium
Luxembourg
Other
All CountryInvestors

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

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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	 			

**PENSION MANDATE**
Institutional Investor Intelligence

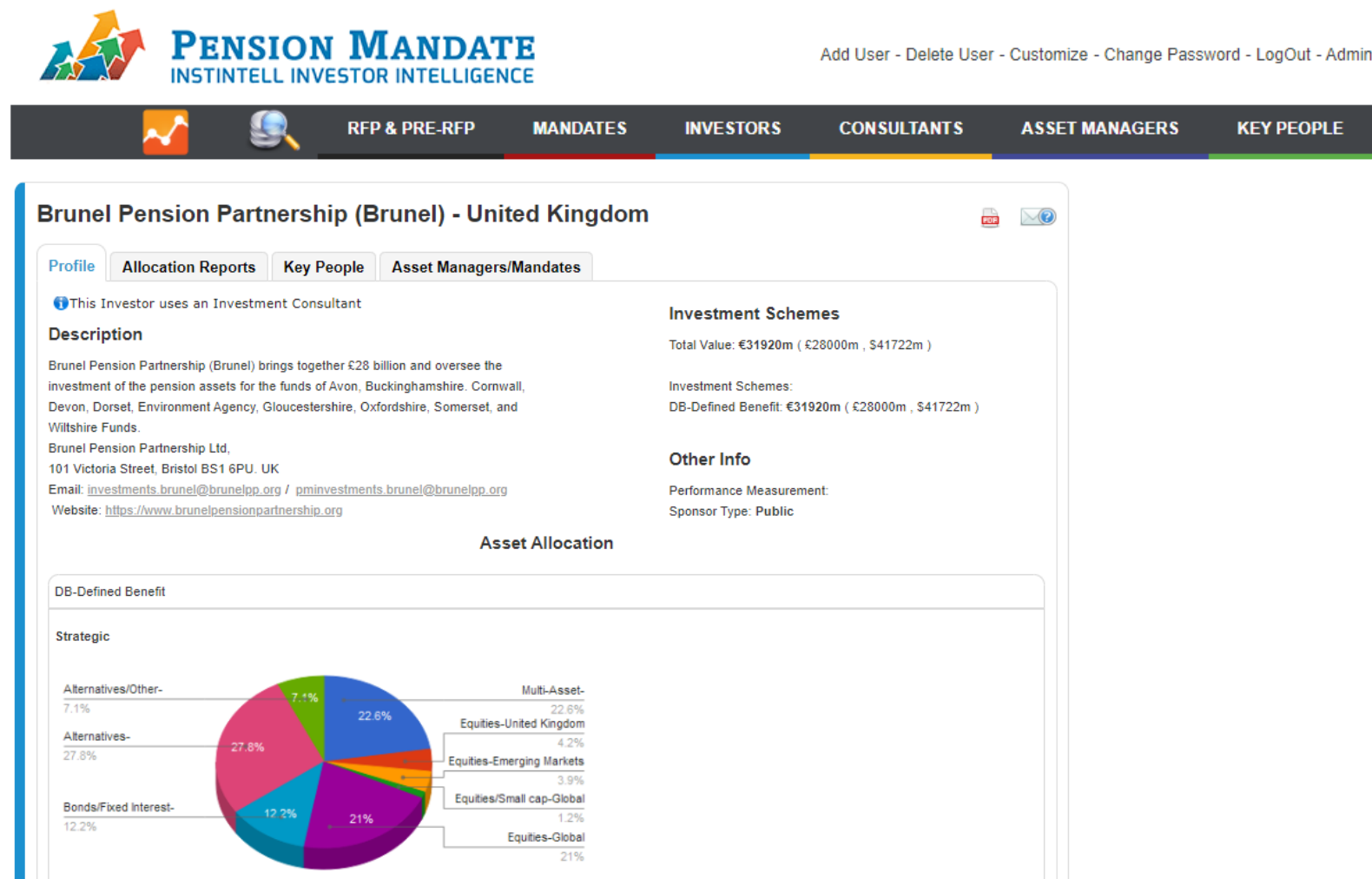
Investors

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.



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.

**PENSION MANDATE**
INSTINTELL INVESTOR INTELLIGENCE

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

**RFP & PRE-RFP**MANDATES**INVESTORS**CONSULTANTSASSET MANAGERSKEY PEOPLE

Brunel Pension Partnership (Brunel) - United Kingdom

ProfileAllocation Reports**Key People**Asset Managers/Mandates

Related Alerts

View AlertsExport

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.

**PENSION MANDATE**
INSTINTELL INVESTOR INTELLIGENCE

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

RFP & PRE-RFPMANDATESINVESTORSCONSULTANTSASSET MANAGERSKEY PEOPLE

Brunel Pension Partnership (Brunel) - United Kingdom

ProfileAllocation ReportsKey PeopleAsset Managers/Mandates

Key People

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




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)	Greencoast Capital	Alternatives, Private Markets					 



RFP & PRE-RFP

MANDATES

INVESTORS

CONSULTANTS

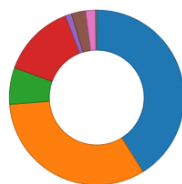
ASSET MANAGERS

KEY PEOPLE

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

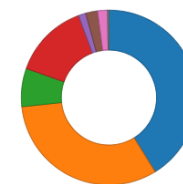
Note: To see the asset allocation in more detail, please click on each slice. All values are in US dollars!

Current Asset Allocation (\$M)



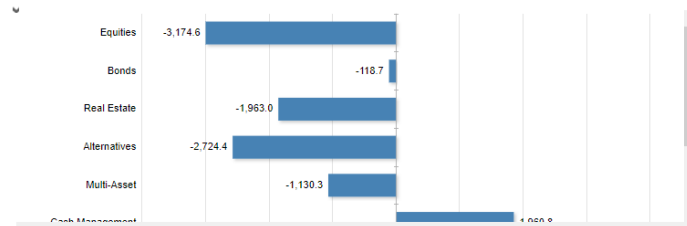
Asset Class	Value	%
Equities	\$ 207968.28	41.14%
Bonds	\$ 164837.75	32.61%
Real Estate	\$ 34372.47	6.8%
Alternatives	\$ 68897.89	13.63%
Multi-Asset	\$ 5900.6	1.17%
Cash Management	\$ 13194.1	2.61%
Annuities	\$ 9246.14	1.83%
Mutual Funds	\$ 1076.82	0.21%

Strategic Asset Allocation (\$M)

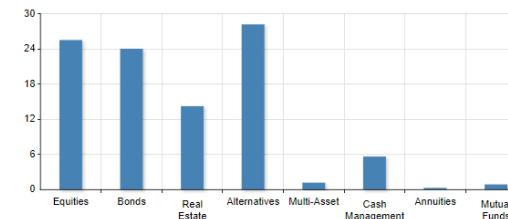


Asset Class	Value	%
Equities	\$ 211142.87	41.16%
Bonds	\$ 164956.43	32.16%
Real Estate	\$ 36335.46	7.08%
Alternatives	\$ 71622.25	13.96%
Multi-Asset	\$ 7030.94	1.37%
Cash Management	\$ 11233.35	2.19%
Annuities	\$ 9344.14	1.82%
Mutual Funds	\$ 1318.32	0.26%

Current vs. Strategic Asset Allocation (\$M)



Asset Class Presence (%)



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.

**PENSION MANDATE**
INSTINTELL INVESTOR INTELLIGENCE

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

RFP & PRE-RFPMANDATESINVESTORS**CONSULTANTS**ASSET MANAGERSKEY PEOPLE

Advanced Search

Looking for: Consultants ▼

Where: Institutional Investor ▼ is

+

Narrow by:

☐ Asset Classes ⓘ	All AssetClass ▼		
☐ Investment Regions ⓘ	All InvestmentRegions ▼		
☒ Country ⓘ	North America ▼	All CountryInvestors ▼	

Search

All CountryInvestors
All CountryInvestors
United States
Canada
Mexico



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

[Add User](#) - [Delete User](#) - [Customize](#) - [Change Password](#) - [LogOut](#) - [Admin](#)

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

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.

**PENSION MANDATE**
INSTINTELL INVESTOR INTELLIGENCE

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

RFP & PRE-RFPMANDATESINVESTORS**CONSULTANTS**ASSET MANAGERSKEY PEOPLE



MEKETA INVESTMENT GROUP



Meketa Investment Group

ProfileKey PeopleInstitutional ClientsSelection-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

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



PENSION MANDATE
INSTINTELL INVESTOR INTELLIGENCE

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

 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 & 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



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.

**PENSION MANDATE**
INSTINTELL INVESTOR INTELLIGENCE

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

RFP & PRE-RFPMANDATESINVESTORSCONSULTANTSASSET MANAGERSKEY PEOPLE

MEKETA INVESTMENT GROUP

Meketa Investment Group

ProfileKey PeopleInstitutional ClientsSelection-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

**PENSION MANDATE**
Institutional Investor Intelligence

Consultants

Example B6

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

**PENSION MANDATE**
INSTINTELL INVESTOR INTELLIGENCE

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

RFP & PRE-RFPMANDATESINVESTORSCONSULTANTSASSET MANAGERSKEY PEOPLE

**MEKETA INVESTMENT GROUP**

Meketa Investment Group

ProfileKey PeopleInstitutional ClientsSelection-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

17/01/2020Global Closed-End Infrastructure Manager Search -RFP

14/11/2019Passive US Equities Manager Search -RFP

29/01/2019Emerging Market Equities Manager Search -RFP

30/10/2018Custody Services Provider Search -RFP

20/09/2018Investment Consulting Services Provider Search -RFP

25/04/2018Senior Direct Lending Manager Search-RFP

17/10/2016SMID Cap Core Equities Manager Search -RFP

13/01/2016Core & Core Plus Real Estate Manager Search -RFP

11/12/2014GTAA Manager Search -RFP

21/10/2014Direct Lending Manager Search -RFP

10/09/2013Actuarial Services Search-RFP

22/01/2013Passive Equity Manager Search-RFP

22/01/2013Opportunistic Fixed Income Manager Search-RFP

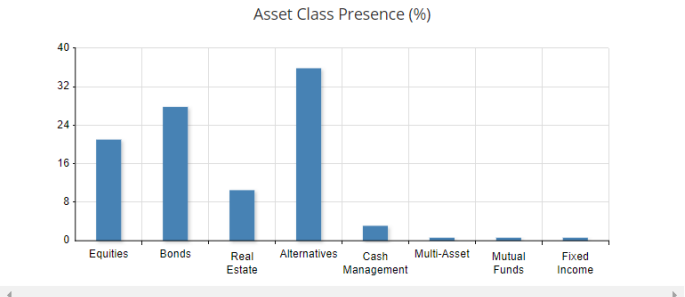
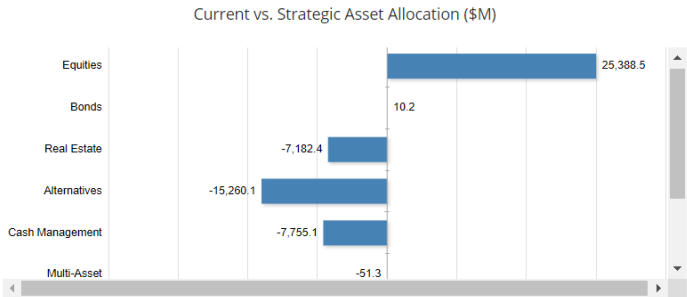
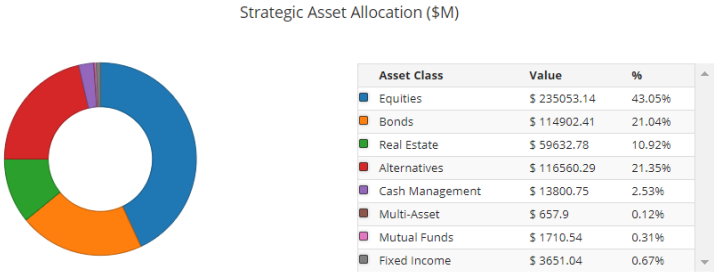
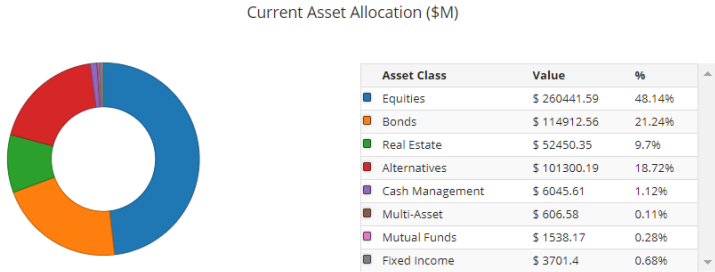
05/01/2012Infrastructure Mandate- RFP Notice

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!



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.

**PENSION MANDATE**
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ESG-SRI

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Bonds

Real Estate

Alternatives

Currency Overlay

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United States

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France

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Mandate Status

TenderRFP

Potential

Underperforming

Completed

Terminated

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Management

Active

Passive

Multi-Manager

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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.

Strategy

Equities-Global

Equities-Developed

Equities-Emerging

Bonds-Global

Bonds-Developed

Bonds-Emerging

Real Estate

Alternatives

Currency Overlay

Mokata Investment Group

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Date: 14 Aug 2019 Asset Classes: Equities Export as PDF:   

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.

Strategy

Equities-Global

Equities-Developed

Equities-Emerging

Bonds-Global

Bonds-Developed

Bonds-Emerging

Real Estate

Alternatives

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Marquette Associates

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Date: 01 Aug 2019 Asset Classes: Alternatives, GTAA Export as PDF:   

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](#)

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Strategy

Equities-Global

Equities-Developed

Equities-Emerging

Bonds-Global

Bonds-Developed

Bonds-Emerging

Real Estate

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Hewitt Investment Consulting US

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Date: 13 May 2019 Asset Classes: GAA, Alternatives, GTAA Export as PDF:   

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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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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:
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[GMO Emerging Markets Opportunities Fund](#)
[Equities](#)

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