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# investment

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**Achieve better outcomes —  
all from your desktop, mobile  
phone or tablet. Sophisticated  
and intuitive, MercerInsight<sup>®</sup>  
gives institutional investors easy  
access to insights and analytics  
on more than 6,700 managers  
and 35,000 strategies.**

Our powerful cloud-based platform provides global, comprehensive coverage of the products available to institutional investors. View a wide range of information — from quantitative analysis on performance and holdings data, to ratings and recommendations from Mercer's global manager research boutiques (comprising 200+ staff members).<sup>1</sup>

# A powerful tool for monitoring and selecting investment managers

**View request for proposal (RFP)-type information** on over 35,000 strategies provided by investment managers via Mercer's Global Investment Manager Database (GIMD™) alongside Mercer ratings and research documents. Screen on environmental, social, and corporate governance (ESG) ratings.

**Review managers** for selection exercises and ongoing due diligence using simple-to-use screening options and filters.

**Create Mercer factsheets** on any strategy at the click of a button. Get an overview of the latest performance, key facts, allocations,\* Mercer ratings and comments.\*

**Create daily email bulletins** on your watchlist of strategies. Get alerts on any Mercer rating changes, significant news items and upcoming research meetings.

**Conduct in-depth quantitative analysis** with the ability to compare to the manager's benchmark and more than 300 Mercer constructed peer groups and over 800 market indices.

**Compare investment managers' fees** (in aggregate) by asset class, vehicle type, account size and more.

**Understand trends in investment manager searches** performed by Mercer, with the ability to manipulate aggregate data, allowing for bespoke reporting and filtering.

**View holdings-based analysis\*** on over 4,000 equity portfolios collected by Mercer each quarter. Analyze the changing shape of portfolios on a time-series or peer-group basis.

**Access detailed top-to-bottom operational risk assessments** of investment managers operations, control environments and risk controls measured against industry best practice.\*

At Mercer, we understand that institutions with internal investment teams often face a number of challenges in their day-to-day activities. MercerInsight provides an efficient and effective platform to:

- **Access a second opinion** when selecting external investment managers, ensuring that governance procedures are followed.
- **Select managers** from the widest possible coverage of product providers in the global marketplace.
- **Monitor external managers** on a qualitative and quantitative basis in a cost-effective manner.
- **Measure manager performance** against comprehensive peer groups, rather than merely against the benchmark.

Our experience and MercerInsight's sophisticated platform help institutional clients address these challenges and be more effective in the marketplace.

## MercerInsight Clients

- Pension plans
- Public plans
- Endowments and foundations
- Insurance companies
- Multimangers
- Wealth management firms
- All Mercer Investments staff

\*Where available.

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