



a wealth of

# choice

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Mercer  
Investment  
Solutions

welcome to brighter

Today's institutional investors are looking to trusted advisors to provide solutions to help them meet their goals in an increasingly complex market environment. But, although every investor must navigate uncertainty and capture market opportunities across asset classes and market conditions, no one is looking for a one-size-fits-all solution. At Mercer, we let you decide how you want to work with us, and we work to make the process simple and transparent. We sift through the noise to provide a clear path forward — always in your best interest.

### Evolving with your objectives in mind

You can choose just the solutions you need from our world-class investment solutions platform to keep your investment objectives in focus and evolve your options as your needs change.

Outsourced CIO (OCIO)	DC 401(k) outsourcing	Private markets	Hedge fund strategies
Benefit from an experienced robust risk management, sophisticated and timely investment management, and potential cost savings through a comprehensive, delegated solution.	Delegate most fiduciary investment and administrative responsibilities <sup>1</sup> through the Mercer Wise 401(k) <sup>SM</sup> grouped plan, in which each employer remains a plan sponsor, or Mercer Wise Pooled Employer Plan (PEP), a turnkey 401(k) program for which Mercer serves as sponsor.	Explore approaches aimed at diversifying public market risk, boosting returns and protecting against inflation with access to private equity, including secondaries and co-investments, private debt, real estate, infrastructure and other real assets.	Potentially diversify out of public market risks, and capture nontraditional return sources and alpha opportunities through access to a prudently constructed portfolio of hedge fund strategies.
Traditional asset portfolios	ESG and impact	Diversity, equity and inclusion	Multinational corporate solutions
Gain exposures to global opportunities and risks through daily liquid, fixed income, equity and real assets portfolios. A multi-manager approach provides access to strategic portfolio design, nimble decision-making and execution.	Take steps to reduce risk, and benefit from the transition toward a renewable and more equitable economy by integrating ESG themes into your portfolio.	Pursue a broader universe of investment return opportunities by expanding diversity of thought and experience, and align with your organizational philosophy, incorporating considerations related to race, ethnicity and gender.	Seek better control, outcomes and transparency through a global governance framework, universal reporting and aggregated purchasing power combined with local investment and regulatory expertise.

<sup>1</sup> In DC 401(k) outsourced arrangements, Mercer acts as a plan fiduciary, investment manager and administrator, as defined by ERISA §3(16) and §3(38).

As an early entrant to OCIO, our platform offers strategic allocation advice, dynamic asset allocation positioning, and manager selection and implementation. We can assume discretion to adjust market exposure relative to long-term targets when we expect emerging opportunities or mounting threats — always within your risk tolerance.

### Extensive insights and resources

As the number-one globally ranked OCIO provider,<sup>2</sup> Mercer uses an approach that’s differentiated in two significant areas:

- **Investment connectivity** — Our globally coordinated, forward-looking strategic capabilities and extensive manager relationships provide the linkages to identify critical trends. These insights are backed by intellectual capital developed by a team of more than 200 investment professionals across various markets.<sup>3</sup> Rely on our OCIO team to monitor important risks and opportunities, helping your portfolio evolve with the market. We use our experience and resources to manage your portfolio to mitigate downside risk, avoid unnecessary complexity and implement our shared best ideas — all in order to deliver strong performance.
- **Platform confidence** — Over Mercer’s 25-year history in the OCIO market and an average firm tenure of 15 years among our senior Investment Solutions leaders,<sup>4</sup> we have intentionally invested in our platform to deliver clear solutions and peace of mind. Our 50+ dedicated portfolio management specialists have visibility into daily portfolio insights and nimble trading capabilities around cash flow management, rebalancing and portfolio monitoring. Our Law & Policy Group keeps clients apprised of looming legal or regulatory changes, and our strategists and decision makers give you timely, transparent analytics and portfolio information. Through an investment solutions relationship, you can access Mercer’s vast economies of scale, benefiting from potentially greater investment diversification and lower negotiated investment fees.

### Mercer can help you:

Focus on the things that matter most	Build confidence in your strategic decisions	Pursue success together
<ul style="list-style-type: none"> <li>• Outcome-oriented solutions</li> <li>• Holistic perspective</li> <li>• Specialty expertise</li> </ul>	<ul style="list-style-type: none"> <li>• Experience in your industry</li> <li>• Global research and ideas</li> <li>• Broad and deep resources</li> </ul>	<ul style="list-style-type: none"> <li>• A heritage of delivering “on-your-side advice”</li> <li>• Customized solutions</li> <li>• Trusted advice</li> </ul>

### A range of investment solutions for:

- Defined contribution plans
- Endowments
- Foundations
- Healthcare organizations
- Defined benefit plans
- Insurers
- Wealth management firms

### For more information

Contact your Mercer advisor to learn how Mercer’s scale, knowledgeable investment professionals, and broad range of global investment solutions and OCIO capabilities can deliver improved governance and better investment outcomes for your program.

[mercer.us](http://mercer.us)

<sup>2</sup> Pensions & Investments website. As of March 31, 2020, Mercer had worldwide institutional assets of US\$260.5 billion under fully or partially discretionary management.

<sup>3</sup> As of March 31, 2020.

<sup>4</sup> Tenure with Mercer includes individuals’ tenure at firms subsequently acquired by Mercer.

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