

# Time, expertise and confidence

Use our Investment Solutions capabilities to help you reach your objectives

welcome to brighter

An abstract graphic composed of numerous overlapping, semi-transparent, geometric shapes (triangles and polygons) in various colors including shades of blue, green, yellow, orange, red, pink, and purple. The shapes are layered to create a sense of depth and movement, radiating from the right side of the frame towards the left.

# What you need, how you need it

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Over the past 75 years, every one of our clients has been different. Their needs and objectives — and their goals for achieving them — have been as unique as a fingerprint.

But they all have one thing in common: the desire for a trusted advisor that understands what they need — and what they don't. An advisor who can draw on informed, impartial, specialist advice and help them implement it effectively.

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**Investment philosophy. Planning. Strategy. Time. Asset allocation. Manager selection. Communication. Resources. Responding. Executing. Rebalancing. Researching. Expertise. Portfolio management. ESG. Sustainability. Innovation. In-depth analysis. Monitoring. Implementation. Private markets. Portfolio. Regulatory reporting. Ongoing impact measurement. Due diligence. Service. Experience. Knowledge.**

# We call it “Investment Solutions”

We take this exact approach with our clients, as each client uses our support in different ways.

From strategic asset allocation advice to skilled portfolio implementation and management, we work with our clients to design and create a framework that fits their specific programs but can also flex as their objectives change over time.

We have always sought to act as an extension of our clients’ teams, offering a wide range of capabilities and expertise when they need it most.

Today, we stay true to this ethos through our Investment Solutions platform. Our framework enables clients to tap into the time, resources and expertise they need from us, whenever and however they need it. Essentially, it gives them confidence that someone is looking out for their portfolios, no matter what the future brings. That someone is our dedicated, skilled team.

**Find out what Investment Solutions can do for you.**



**You may have heard different names for this approach: Outsourced CIO, delegated solutions, implemented consulting, fiduciary management. But what’s in a name? They’re all centered around the same thing: supporting these unique institutional investors to meet their goals more efficiently. We call it Investment Solutions — and strive to make it work for you.**



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## Myth



**An investment solutions platform is a one-size-fits-all option.**



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## Fact

**Investment Solutions do what you need them to do and not what you don’t.**

From customized investment strategy design to implementation and monitoring managers, each client works with us however they choose.

We’re here to support investors in whichever way they need us — and we can flex with you along your journey.



# Discover Investment Solutions

The background image shows a large, open-plan interior space with a striking architectural design. The ceiling is composed of numerous white, curved ribs that create a sense of depth and movement. The floor is a light-colored, polished concrete. In the foreground, a wooden deck with parallel planks is visible, leading the eye towards the center of the space. The lighting is soft and even, highlighting the textures and curves of the architecture.



# What we do



## Focus on the things that matter most

One of the main reasons our clients choose to outsource portfolio management responsibilities is to benefit from an extra pair of skilled hands when needed to manage overall strategy and the challenges their organizations face.

Our approach to investment solutions is to act as an extension of our clients' existing teams. We fit around what they already do rather than provide a set of prescribed services. We provide only what our clients lack the time, resources or expertise to do themselves.

Clients choose how we support them — from designing sustainable investment policies to managing day-to-day portfolio tasks to shield their assets from risks and capture emerging opportunities with agility.



## Build confidence in your strategic decisions

We understand that each investor wants something different, but how investors achieve their goals is just as important. Each of our frameworks is designed with your investment philosophy and beliefs in mind. We take care to match your organization's objectives with an approach that aligns well with your risk budget and sustainability outlook.

Our objective is to help you meet yours. Our Investment Solutions platform is designed to position your portfolio to help manage the risks that could impact returns while also ensuring you're ready to move quickly to capture emerging opportunities identified by our expert investment team.



## Pursue success together

With thousands of institutional investor clients worldwide, we relish the challenge of finding a way to work with clients to provide exactly what they need — and not what they don't. We have pioneered a governance framework that is unique to each of our clients to help them articulate and reach their objectives more effectively. With the full power of Mercer's many global and locally based teams and strengths behind them, our clients can engage with market-leading specialists at their exact point of need.

From designing customized investment and asset allocation strategies to executing and dynamically managing portfolios, we bridge the gap between advice and implementation, providing only what you require.

# Discover the Mercer Investment Solutions difference



# How we do it

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## Focus on the things that matter most

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We pride ourselves on offering local service with a global outlook, helping our clients access what we believe to be the brightest and most relevant opportunities wherever they exist in the world. Because we have team members in more than 25 locations worldwide, we understand the nuances of regional and sectoral variation. We strive to provide what you need — the way you need it.

We also recognize that our clients' requirements are vast and varied. Some want frequent, regular contact, whereas others prefer a lighter touch.

Our responsibility is to meet our clients' service preferences while leaving them confident that we will always be there when they need us — especially when the unexpected happens.

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## Build confidence in your strategic decisions

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Our decades-long history as an investment consultant has allowed us to develop a deep understanding of capital markets and their movements. We have witnessed many market cycles and guided thousands of clients through the best and worst of them, which has informed our detailed advice and policies. Our investment and asset allocation strategists are essential members of our OCIO teams, committed to crafting long-term

strategies and portfolios that aim to meet each client's objectives.

To achieve this, we rely on our globally coordinated research team, which painstakingly seeks, identifies and analyzes around 7,000 strategies across the full spectrum of investments. The team regularly meets with and monitors this universe of managers so we can be confident about their continued merit. Additionally, we carry out frequent operational due diligence on these managers to help prevent supplementary risks from appearing in our clients' portfolios.

Along with this breadth of scope, our time in the market has enabled us to build relationships with a host of high-quality managers in every corner of the world. We believe we have access to an unrivaled span of strategies, often allowing us to gain critical visibility into upcoming launches, which helps our clients plan well into the future.

Thanks to these relationships and our size and market position, we can often pass on savings to our clients. We can also frequently secure access to highly rated managers unavailable to many in the market, offering forward-looking visibility into launches across a range of traditional and private market strategies.<sup>1</sup>

The nimbleness of our Investment Solutions lets us take action quickly to shield client portfolios from potential danger while positioning them to capture opportunity.

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## Pursue success together

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Identifying innovative ideas and approaches to help our clients reach their objectives more quickly and effectively has played a vital part in our history as one of the world's largest investment consultants.

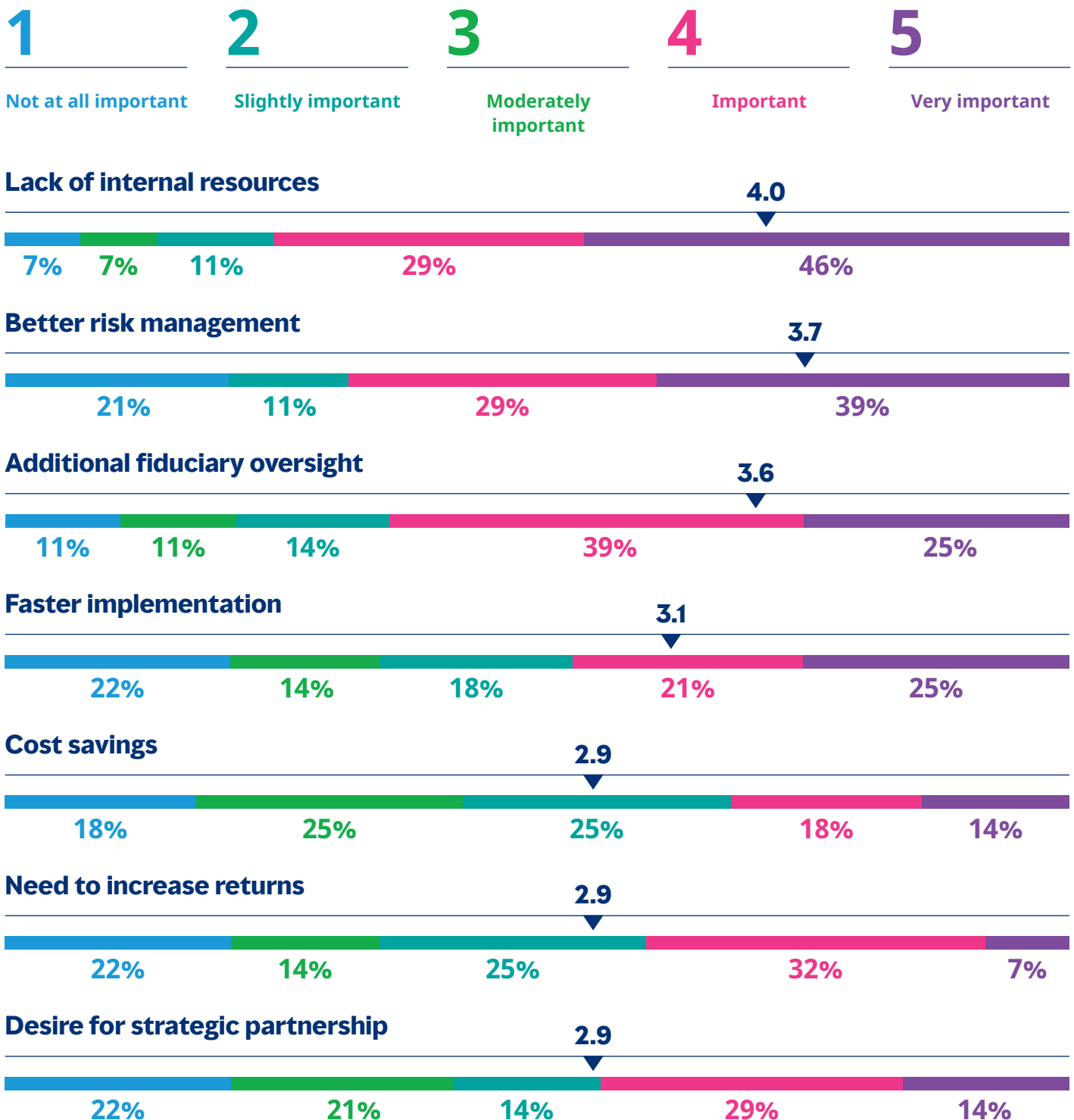
This passion for helping our clients stay ahead of the game is also crucial to our Investment Solutions platform. From designing customized frameworks and formulating investment funds and portfolios to an underlying operational setup that rivals any in the asset management industry, we constantly push the boundaries of what is possible to help our clients get where they need to be.

A key benefit of our Investment Solutions platform is the speed at which our clients can access our best new initiatives and proposals. From ground-breaking investment ideas to pioneering research on sustainability, we build in the services and opportunities that are right for you.

As each of our clients is different, we take care to offer the most suitable tools and approaches: from de-risking triggers for defined benefit pension plans to customizable reporting for insurers.

<sup>1</sup> Mercer does not guarantee access to managers.

## Reasons for adopting governance models that increasingly include delegation



Source: Chief Investment Officer. "Outsourcing Trends," 2020, available at ai-cio.com.



# Discover our clients

# Whom we help

## Focus on the things that matter most

Priority is a key theme for our OCIO clients, and it can be split into two parts. First, our framework helps our clients prioritize the critical decisions they need to make about their long-term portfolios by assigning labor- or resource-intensive tasks to our specialist teams.

Second, we want our clients to know that their portfolios become our priority. Through the OCIO framework, they can be confident their portfolios are in skilled hands in all market conditions.

Importantly, we also prioritize the service aspect of our OCIO role. We believe good service provides exactly the support it should — without overstepping the mark. At the beginning of every new client relationship, we establish expectations and deliverables and take the time to understand how we will work together.

There is no hard-and-fast rule around how many times we will check in with a client each month or the number of reports they should receive. We know that for some investors, the time we leave them alone is as important as the time we are in touch.

We also know that some investors need regular, detailed data to help them assess and strategize their next moves. Others prefer a top-down view that highlights specific areas of interest and importance.

Whichever way you want to work with us, we can assure you of one thing: We want to ease your burdens, not add to them — and we have worked with enough clients to understand that one size can never fit all.



**We are honored to be recognized again this year in the most recent **CIO magazine survey** as the global market leader for full discretionary OCIO assets under management.\* We're delighted to help our clients address challenges with increased governance, complexity and cost across their investment portfolios, and move quickly to capture market opportunities.**







# What Investment Solutions mean for you

## Use our capabilities to reach your objectives

Everything about our Investment Solutions is built around you. From setting your objectives to reporting on your progress, we are there to provide support wherever and whenever you need it.

Rely on our experts to provide the advice, insight, implementation and operations your portfolio needs to help you invest with confidence.

Explore what Investment Solutions might mean for your portfolio today.

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**Contact your Mercer representative to learn more.**

**Email us:** [MercerInvestmentSolutions@mercer.com](mailto:MercerInvestmentSolutions@mercer.com)

**Visit our website:** [www.mercer.com/investment-solutions](http://www.mercer.com/investment-solutions)

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