MERCER

Keeping you focused on your future

Supporting endowments and foundations to deliver their investment objectives, no matter what the future brings.

welcome to brighter

Find strength in our numbers

The growing complexity of endowments and foundations (E&F) investments requires significant experience and expert technical knowledge, supported by resources and a global reach few organisations can claim.

As your trusted advisor, we help you navigate uncertainty and capture opportunities to help you reach your investment goals.

Our specialist E&F team advises charity clients globally with total assets of $254 billion under advice and total assets under management of c. $13 billion.[1]

Over the past 15 years, we have built the largest investment solutions business[2] by assets in the world, managing more than $305 billion for more than 1,000 clients.[3]

Our value relies on technical investment expertise, global resources and an in-depth understanding of the E&F market built over many years. We structure our solutions with the aim to deliver the right outcomes for our E&F clients.

Explore how we can help you keep your objectives in focus and fulfil your purpose.

$305 billion
in assets under management

advising on
$15 trillion
of investments

6,717
investment managers rated worldwide

1,000+
clients

[1] Source: Mercer, 31 December 2019.

[2] As defined in *Chief Investment Officer* magazine's 2019 Outsourced CIO Buyer's Guide Survey, worldwide discretionary assets under management as of December 31, 2019 as reported by each firm to ai-CIO (http://www.ai-cio.com/2019-Outsourced-Chief-Investment-Officer-Survey/). AUM data as of 31 December 2019.

[3] Source: Mercer, 31 December 2019.

Why an investment solutions platform?

From large global foundations to small family-run endowments, we help organisations all over the world improve the oversight and control they have over their portfolios, and manage their reputational and investment risk while also managing their costs.

Whether you have one single endpoint or an ongoing need for support for your investments, the governance framework delivered by our investment solutions ensures your important long-term strategic decisions are not clouded by short-term issues.

Trustees and directors can own and shape the beliefs and principles, which provide a structure for all future investment activity. Importantly, precious governance budget is not used to manage day-to-day investment operations, but instead is focused on long-term strategic decision-making.

A solution whatever your needs are

We know that every client is different, with complex needs specific to their organisation.

Our experienced strategists will support your organisation throughout the investment journey to drive better outcomes for your cause — for example, by helping you define your investment beliefs, incorporate them into an investment policy document and integrate them within each area of your investment portfolio. We support our clients across a continuum of services, including:

- Sustainability and reputation management
- Income/inflation/total return portfolios
- Diversification of asset classes (including private market solutions)

- **Enhanced governance:** Building a framework to support you — strategy creation, asset class and manager diversification, risk management, dynamic asset allocation, cost efficiencies, standardised reporting, dedicated teams

- **Improved implementation:** Efficient and timely execution of decisions, impartial research by highly rated global managers, access to specialist funds, streamlined investment processes, bespoke fund reporting, cost efficiencies, diversification

- **Reputational risk management:** Your ethical and responsible policy creation, highly rated managers and strategies, dedicated and experienced Responsible Investment team, enhanced oversight and best practice governance for your reputation

Your choice, your objectives, our flexibility

Our investment solutions platform is a governance framework through which endowments and foundations can invest with confidence. Our clients often choose to retain control of key aspects (such as long-term strategic decision-making) while relying on Mercer to implement the day-to-day administrative duties associated with their investments.

- Robust governance framework to better support your internal resources
- Global Responsible Investment hub and research teams
- Informed portfolio diversification at manager and asset class level
- Access to a large pool of over 36,000 strategies and 6,000 highly rated managers through our solutions[4]
- Impartial proprietary research on all third-party providers
- Significant buying power, reducing underlying manager fees
- Prompt implementation of investment strategies
- Efficient and disciplined portfolio rebalancing
- Access across a full spectrum of asset classes, with the ability to capture nascent market opportunities
- Experienced advisors and asset allocation strategists
- Integration of responsible investments, with access to impact investing and sustainability themes

[4] Source: Mercer, 31 March 2020.

ESG hub

Trust our team to help you to stay in control of your investments.

Well-resourced, experienced and dedicated global Responsible Investment team

Strategic investment policy created with you to ensure long-term direction

Responsible policy creation, keeping your objectives and reputation aligned

Manager due diligence, monitoring, review and oversight on your behalf

Extensive research on responsible investment risks and opportunities — with over 5,500 ESG-rated strategies

Regulatory reporting service and a dedicated team to deliver your objectives

MARSH & McLENNAN COMPANIES

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