



Investment Oversight & Reporting is an essential part of an organization's governance program.

Swipe to explore key components incorporated in best-in-class investment governance reporting.





1. Asset Allocations vs. Policy Targets

Asset class weights are going to shift. Have they moved outside the range agreed upon within the Investment Policy Statement?





2. Portfolio Summary & Return Analysis

Evaluate each asset class and identify where your portfolio returns are coming from. Use multiple time horizons to see historical trends.





3 • Total Portfolio Return Analysis

Compare your portfolio against a relevant peer group. Review long-term annualized return data and risk metrics.





4. Comparative Analysis of Each Asset Class Within The Portfolio

Independent, unbiased review of each asset class vs. a true peer group. Completed by an expert at arms length.





5. Portfolio & Asset Class Observations

Manage by exception. Identify which investments are struggling to meet performance goals, have excess risk, reduced their income generation.



Elevate your Organization's Investment Oversight Program

Use insights from the GMR Database & Performance Reports.

Good investment governance isn't just about selecting Managers or approving an Investment Policy Statement. It's about ongoing oversight, accountability, and making sure the portfolio continues to align with the organization's objectives over time.

Markets change, Managers change, risks evolve.



Contact **Global Manager Research** for customized reporting options, access to the largest dataset designed for Canadian institutional investors, and the latest issues of the GMR performance reports



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