

Asset manager briefing Redrawing the research map together

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A business of Marsh McLennan



Helping our clients capture the benefits of active management



Mutual Series' Michael Price Dead at 70

Mercer FundWatch

modern ratings for modern investors

Welcome to Mercer FundWatch™

An investment ratings service providing research and ratings on funds available to individual investors and their financial advisors.



Ratings that empower investors seeking Alpha



Forward-looking

Our simple star rating system guides individual investors and financial advisors to those funds which we believe have greater out-performance prospects. Even new funds can get ratings.



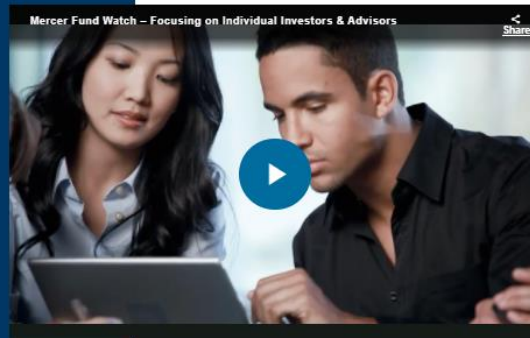
Research-driven

Our framework is evidence-based, flexible, and repeatable. We focus on the relevant characteristics that have been shown to enhance the probability of sustainable alpha generation.



To help individuals achieve their goals, Mercer Fundwatch provides investors and their financial advisors with access to the same high-quality analysis that institutional investors have utilized for decades.

Beverly Sharp,
Strategy Leader, Investment Research



Overview

This strategy aims to outperform its benchmark, the CSI 300 Index, utilizing a systematic investment process, which combines multiple factors, including those specific to the China A-share market, to build a diversified portfolio of China A-shares.

— Overall assessment

ESG 4 3 2 1
LOW HIGH

★★★★★
5 out of 5 stars

Fund facts

Retirement investment decisions are impacted by the regulatory environment



Australia



United Kingdom



United States

Aggregate fee arrangements can be mutually beneficial for clients, asset managers and Mercer

76
asset
managers ...

... spanning
235
individual
strategies across
a variety of asset classes ...

... ranging from
straight fee
discounts to
negotiated fee
scales based on
aggregated Mercer client
assets.

As of March 2022

Helping our clients operate in a complex environment

Share
diversity data
about your **key**
decision makers



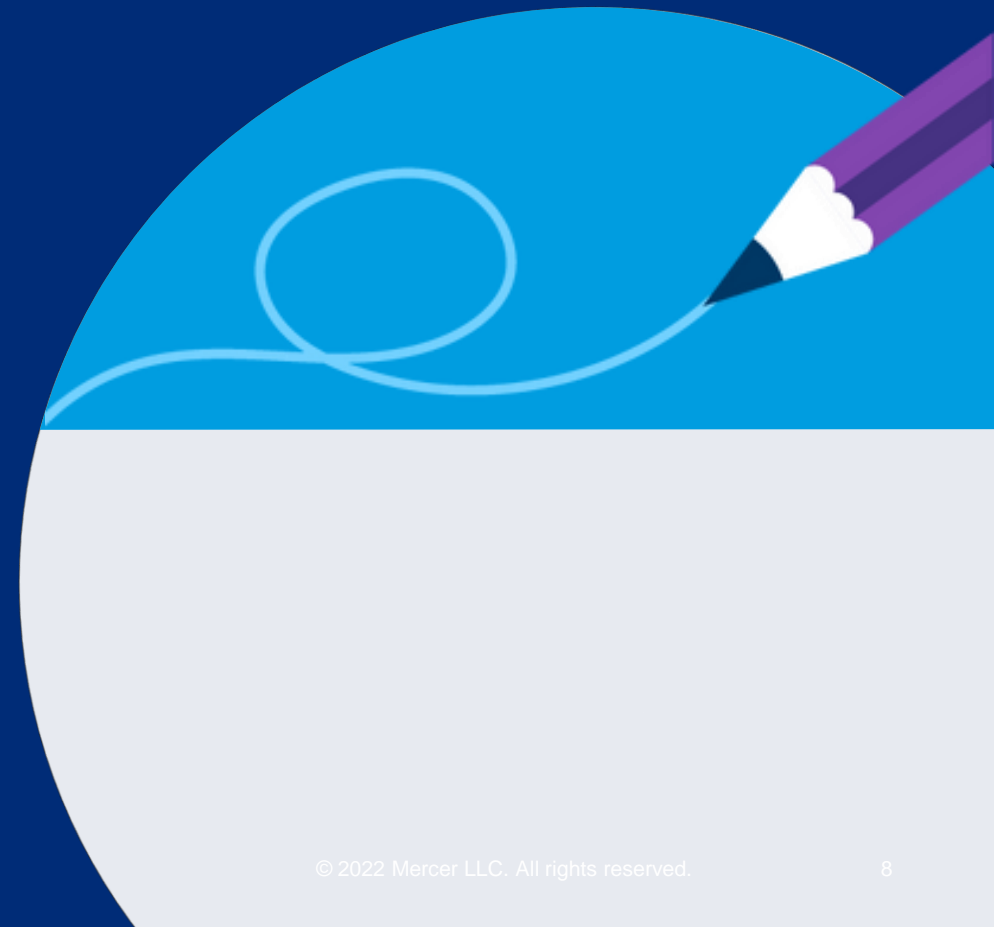
Curate your
strategies



Operational
due diligence



What are Mercer's gaps?





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