

Investment Benchmarking Service

Measure • Compare • Learn • Improve • Validate

How Our Clients Use The Service

Demonstrate Value for Money to Stakeholders

Demonstrate to your Board and key stakeholders that your investment costs and staffing levels are reasonable. Clients often cite our benchmarking results in their annual reports.

Plan for Change and Growth

How much will it cost and how many FTE will you need to move into a new asset class or implementation style? How will costs and FTE change as you grow?

Manage and Reduce Costs

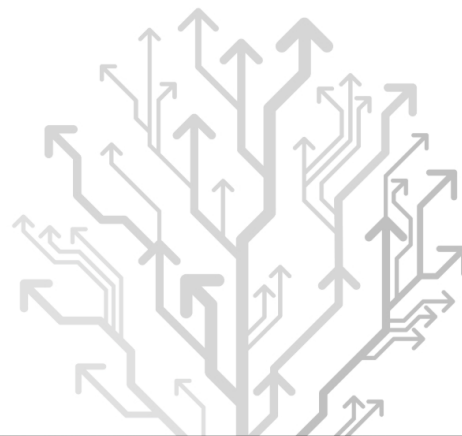
Many have successfully negotiated lower fees and costs with managers and custodians. Others have used our reports and research to migrate to a more effective cost structure by changing implementation styles.

Support for Changes to Investment Programs

Our report provides external validation of what others are doing, which can be invaluable when trying to get buy in from your stakeholders to make changes to your investment programs.

Setting Performance Targets

What is top quartile value added by asset class? Which asset classes are the most and least efficient?



How It Works



Measure

Our methodology and rigorous data cleaning by our team of analysts ensure like-for-like comparisons of costs, risk and performance.



Improve

Insights gained from CEM analysis and research helps you to optimize your performance and manage your costs.



Compare

You get a comprehensive benchmarking report that compares your returns, value added, risk, costs and FTE to a peer group customize for you and your country universe.

Learn

Understand where and why you are different from your peers. Benefit from our experience and research through a personal presentation and discussion of your results.

Unique Global Investment Database

400 funds, \$10 trillion assets, 27 year history

Global Investment Database	Total Fund	By Asset Class	By Implementation Style
Assets	✓	✓	✓
Returns	✓	✓	✓
Benchmark Returns	✓	✓	✓
Net Value Added	✓	✓	

Base Fees	✓	✓	✓
Performance Fees	✓	✓	✓
Internal Costs	✓	✓	✓
Transaction Costs	✓	✓	✓
Internal FTE	✓	✓	✓
Policy Weights	✓		
Asset Risk	✓		
Asset-Liability Risk	✓		

The Service Includes Annual Research

Past topics include:

- Real Estate By Implementation
- Asset Allocation and Fund Performance of Defined Benefit Pension Funds in the United States, 1998-2016
- Transaction Costs Amongst Large Asset Owners
- Asset Allocation, Cost of Investing and Performance of European DB Pension Funds: The Impact of Real Estate
- Hedge Fund Reality Check 2018
- Asset Allocation and Fund Performance of Defined Benefit Pension Funds in the United States, 1998-2015 (Updated)
- Asset Allocation and Fund Performance of Defined Benefit Pension Funds in the United States, 1998-2014
- Hedge Fund Reality Check
- Comparing Pension Plan Operating Costs: Correcting the Fraser Institute's Faulty Analysis and Conclusions

[See all research](#)

Contact Us

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