



# Managing The Investment Managers

(4<sup>th</sup> – 5<sup>th</sup> March, 2019)

## Day 1:

- **The responsibilities of being an asset owner**
  - The investment journey
  - Improving the 'investment: governance' ratio
- **Managing third party traditional (active and passive) investment managers**
  - Manager selection considerations and process
  - Ongoing manager monitoring - what to look for, triggers/watch list criteria
- **Managing third party traditional (active and passive) investment managers**
  - Ongoing monitoring – asset and style allocation
  - Portfolio design, investment framework



## DAY 2:

- **Managing third party alternative investment managers**
  - Overall process considerations
  - Coverage model
  - Sourcing
  - Quantitative v Qualitative assessments
  - Ranking and comparing: IP and conviction
  
- **Managing third party alternative investment managers**
  - Ongoing manager monitoring - what to look for, triggers/watch list criteria
  - Operational Due Diligence
  
- **The responsibilities of being an asset owner**
  - Asset clusters and refining allocations
  - Long term return expectations and how they influence allocation decisions
  - Moving from benchmarking to a target portfolio