SWF & Institutional Investor Services



The following is a list of some of the services for Sovereign Funds and Institutional Investors to enable clarity of strategy, organisational alignment and successful strategy execution.

Peer Review	Peer selection, comparison, analysis, interviews and face-to-face meetings to benchmark the organisation against its peers – followed by write-up and appropriate dissemination of the resultant report.
Governance Review	Review of organisation's governance structures, committee remits and operation, and decision-making processes. Gap analysis, comparison with peers, comparison with intended outcomes.
Strategy Review	Review of organisation's investment and business strategies to ensure clarity of purpose, objectives, investment strategy, strategy execution and business planning processes. Interviews with leadership, staff and peer comparison.
Are you a long term investor?	Review of organisation's approach to being a 'long term investor'. What does this mean? How is it cascaded throughout the organisation? How is it reflected in its investment strategy, principles, objectives & benchmarks, behaviours, incentives?
Culture Review	Review of organisation's intended and actual culture to ensure it is aligned with the strategy. Involves interactions and interviews with leaders, employees, customers, suppliers, partners and third parties.
IC Support	Review of support to the investment committee to ensure robust debate and insight to ensure effective and informed decision-making. Could include review of the way other asset owners address the opportunity.