

DiligenceVault  Mercer

Seamless Investment Due Diligence (IDD) & ESG Data Collection and Ratings



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WEBINAR TAKEAWAYS

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01

A 2-sided Digital Due Diligence platform works because it ultimately benefits both asset owner and fund manager. It allows both parties to collaborate in real time as data is exchanged across the platform.

02

Moving manager due diligence from a document-based, *unstructured* format to a cloud-based, *structured* format has significant benefits to allocators including:

- Gaining efficiencies from automating repetitive, data management tasks, which, in turn, frees up time to focus on the actual analysis of the information
- Integrations (such as the one between DiligenceVault and Mercer FundWatch™) provide allocators with a more robust and trustworthy set of information with which they can make investment decisions
- The potential to leverage new technologies such as AI and machine learning to facilitate decision making - something that is gaining momentum in the industry and is impossible to do when information is trapped in documents and spreadsheets

03

Two key investment themes that are emerging for investors include:

- The fundamentals of investing in China remain strong due to strong domestic demand and the pace of technological innovation. There is upside in pursuing an active management investment style in the region by allocators

- ESG considerations have become increasingly important to Asian investors, with such factors playing a larger role as part of the manager due diligence process. Mercer FundWatch™ assigns an ESG ratings score to the managers on its platform, helping to circumvent the greenwashing efforts that dominate the industry
- Investors are very focused on climate change as part of their ESG considerations as the view is that it poses global systemic risks in their portfolios with the goal of attaining a carbon-free portfolio as part of their risk management efforts

04

Allocators are focused on three levels of information when developing their ESG criteria framework, and leveraging technology makes measurement and reporting possible:

- Evaluating the manager and subsequent portfolio against Diversity, Equity and Inclusion (DEI) benchmarks
- What evidence can they provide that supports their stated ESG investment mandate and goals and identify who is responsible to executing said mandate
- Understanding what ESG-related KPIs are collected from the underlying portfolio companies and how they are aggregated to support an overall view of the portfolio

Interested in participating in our 2021 Webinar Series? Contact us!

WEBINAR
TEAM

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