Firm Profile:
Private Markets,
Fund of Funds

Assets Under Management:
$50bn

Geography:
North America

eVestment Client Since:
2017

Subscriptions:
eVestment Private Markets
(Market Intelligence)

This Private Markets Fund of Funds is one of the industry's most experienced investors and provides clients with solutions across fund investing, secondaries and co-investments, as well commingled funds and separately managed accounts.

eVestment spoke to one of the firm's **Client Relations team** members to find out how adopting eVestment Private Markets has impacted their capital raising and client relationship management activities.

EVESTMENT
Private Markets

CASE STUDY

Private Markets: $50bn Fund of Funds

Enhancing Existing Processes

Keeping up to speed with the latest news, investment activity and strategic decisions of existing and potential clients is valuable for this Fund of Funds and specifically their Client Relations team. Prior to utilizing the Market Intelligence functionality of eVestment Private Markets, the Client Relations team was reliant on reviewing clients' websites and other news outlets to keep up to date with this information. However, using disparate sources made it challenging to ensure all relevant information was being captured.

"We used a range of resources to try and gather useful information – such as client websites – but it always proved challenging to ensure you could get all the information required. eVestment Private Markets aggregates it all into one place which makes it much easier."

The efficiency that the team has realized from having a one-stop source for this information has made a tangible impact.

"We don't have to search individual websites, trying to find information that isn't always easy to find – with eVestment Private Markets it's all in one place and definitely improves our efficiency. Not spending this additional time searching allows us to do other parts of our jobs that are more timely, more high impact."

Deeper Insights

The Client Relations team has also benefited from the access to more granular insight on investors, their activity and their allocation plans that is provided by eVestment Private Markets. The users within the team state that this has been especially helpful in ensuring they continue to have relevant communications and dialogues with their clients.

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Associate, Client Relations

Mitigating Missed Information

The Client Relations team work closely with the firm's Investor Relations division, who also require timely, relevant news on the institutional investor market. The team cites the email alerts functionality of the Market Intelligence tool as a key benefit in ensuring the teams stay up to the minute on any important information.

"If we participate in a presentation, and the investor writes a review, we know about it as soon as it's available because of the alerts we have set up – that is very helpful."

Being aware of this information also enables the team to be even more proactive in their work, aiding positioning and pitches to ensure relevancy.

"Getting a sense of where investors' minds are at and what strategies they're looking to pursue is obviously hugely helpful in sales efforts. We now know if investors are looking to allocate to a particular sector, strategy or geography, and that allows us to better evaluate whether our solutions are a good fit for that investor and their goals."