

**Firm Profile:**  
Private Markets,  
Fund of Funds

**Assets Under Management:**  
\$30bn+

**Geography:**  
North America

**eVestment Client Since:**  
2017

**Subscriptions:**  
eVestment Private Markets  
(Market Intelligence)

Established more than 40 years ago, this private markets fund of funds is one of the industry's largest and most prominent. The firm manages more than \$30 billion of assets for a global and diverse investor base that includes more than 300 pension plans, endowments, foundations and other institutional investors.

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

## CASE STUDY

### Private Markets: Global Fund of Funds

#### Overcoming Challenges

Like any private markets investment manager, timely and granular information on the institutional and competitor landscape is an important requirement for this fund of funds' Investor Relations team.

Yet with a large investor base that includes a significant number of public pension plans, keeping up to speed on their latest activity and news was a task that proved time consuming for the team prior to adopting eVestment Private Markets.

*"Ahead of any investor meeting we do our research. We had to take the time to go through public plans' websites to track down the information we needed, but it wasn't always readily available."*

Other sources weren't able to provide truly actionable information, either.

*"We have access to various databases, but they only scrape the surface of the information on upcoming searches, allocations, etc. eVestment Private Markets is much more granular."*

#### Increasing Research Efficiency

Since subscribing to eVestment Private Markets in 2017, the Investor Relations team has found collating and accessing this information a much more efficient process.

*"The ease of having all of the public documentation accessible and searchable in one place through eVestment Private Markets is very helpful. It's allowing me to focus more on engaging with our clients and prospects, rather than doing the background research."*

Utilizing the configurable email alerts functionality to ensure the most relevant information is sent directly to users' inboxes has also been a significant benefit.

*"The ability to set up the email alerts is very valuable. They allow us to limit our time spent searching by bringing together the most relevant documents that we are interested in. They also surface information to us that we're not aware has been published."*

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**Vice President, Investor Relations**

#### Removing Knowledge Gaps

The level of information the Investor Relations team can now access through the Market Intelligence tool within eVestment Private Markets is far greater than previously, and allows them to ensure they know what is top of mind for clients and prospects alike.

*"Consultants' reviews with their public plan clients are very helpful to us – to be able to see the feedback shared by the consultant ensures we have the background on their broader strategy. It lets us formulate our thoughts on the specific topics or issues that are top of mind."*

#### Gaining Access to Deeper Competitor Insights

The Investor Relations team find having access to eVestment Private Markets provides greater access to valuable insights on their peers and market positioning.

*"Some of the information that is most valuable to us is finding out how our peers are positioning themselves, and other intel from their presentations. It helps us prepare ahead of important client meetings, but also prospective meetings."*

Gaining a clients' perspective on their own firm is also an area that the team finds useful feedback to develop their positioning strategy.

*"We've been in final presentations where the information on us as well as the review of other competitors was posted, which is highly useful to know where we are positioned in competing for their business."*