



## Supporting value-driven investments with bespoke manager searches

As institutional investors grow more focused on the impact and transparency of their investment portfolios, the need for bespoke investment solutions is more important than ever.

We sat down with a leading consultancy who are helping clients navigate this complexity. Through its growing Private Capital team, the firm works with a broad mix of university endowments, family offices, and charities.

In our conversation with their Assistant Investment Consultant, who sits in the Private Capital group, we learned how they've been leveraging CAMRADATA by With Intelligence to support their clients' growing demands. The team has been using the platform's assisted search functionality to run bespoke mandate searches, allowing them to meet client expectations.

While the consultancy's traditional client base consists of pension schemes, the firm now sees a rising demand from institutions like universities. As organizations, universities bring distinct requirements to the table.

One recent case highlighted this: a university with approximately £200m in assets looking to transition from an active to a passive mandate. However, a key constraint complicated the search. The fund needed to exclude companies involved in animal testing. It was noted, "That's a pretty unusual exclusion. Generally, across the board, what we'll see is tobacco exclusions, controversial weapons, etcetera."

After internal checks, their equity and sustainability teams came up short, so the team turned to us to conduct an assisted search. While no pooled products met the requirements, we were able to surface two investment managers willing to put together a SEG portfolio. Those managers impressed during discussions with the consultancy, "We had conversations with both managers, and they were really good."

What stood out most wasn't just the outcome CAMRADATA provided but also the efficiency. "Typically, when we do a formal manager selection, we are going out to the full market," they explained. "We have extensive



networks, but we're always conscious of the time required to go manager by manager. That's where CAMRADATA fills in the gaps, especially in areas where we don't yet have full coverage, like universities."

The line between investor values and investment mandates has always been important, and university endowments are uniquely influenced by student activism. As such, there is an expectation that bespoke requests will increase, "Student views are quite specific, so potentially, we will see more of these student-driven types of searches in the future."

While the consultancy sees most manager requests emerging ad hoc, they note that our ability to pre-build buy lists will prove helpful as search volumes rise, "You guys are super helpful when it comes to searches, especially where we don't have the same level of depth that you guys have. We find CAMRADATA data really helps us fill in the gaps."

With value-driven investor expectations growing more complex, consultancy firms will need to continue to innovate to stay ahead. With tools like CAMRADATA by With Intelligence in their corner, they're positioned to keep delivering.

