HOW DIFFERENTIATED INSIGHTS
Lead to stronger portfolios

How can asset managers build better portfolios for a better world?

Using risk & return analytics, along with strategy and ESG considerations, asset managers can:

- Propose compelling solutions
- Monitor portfolio performance
- Positioned for success

Throughout the process, Insights help clients understand the rationale behind portfolio recommendations.

Insights in action

Let’s take a look at how these benefits translate into a hypothetical client case study:

Given this profile, a variety of portfolio insights will help Pepsico understand how a new solution meets their needs.

Build strong portfolios

Risk/return analytics

- Value creation
- Risk management
- Sustainable investing

ESG considerations

- Climate change
- Water security
- Human rights

Portfolio outcomes with and without ESG considerations

- Higher returns
- Lower volatility
- Improved risk-adjusted performance

Propose compelling solutions

- Risk/return analytics
- ESG considerations

- Clients
- Risk
- Allocation
- Risk/return analytics
- ESG considerations

- Proposal
- Investment
- Proposal
- Investment

Monitor portfolio performance

- Risk/return analytics
- ESG considerations

- Performance
- Portfolio
- Risk/return analytics
- ESG considerations

- Benchmark
- Performance
- Benchmark
- Performance

Positioned for success

- Risk/return analytics
- ESG considerations

- Strategy
- Investment
- Strategy
- Investment

- Future
- Strategy
- Investment
- Future