

Diversity & Inclusion Data

Over 1,000 institutional investors and investment consultants spanning 45+ countries rely on eVestment as their source of data on institutional managers. Increasingly, this global network of allocators wants to understand how managers are thinking about diversity and inclusion and implementing D&I policies at the firm level.

D&I questions in the eVestment database give managers the opportunity to more fully articulate their firm’s approach to diversity and inclusion and, importantly, streamline requests for D&I data. Instead of providing it again and again to requesting asset owners and gatekeepers, managers provide it just once, in the institutional market’s most influential database.

D&I Questions

Can the firm provide diversity statistics for the entire portfolio management team?

- Yes
 No, due to firm policy
 No, due to privacy regulations/laws that affect some or all of the team

If yes:

	Female	Male	Non-Binary	Decline to State	Total
Asian	%	%	%	%	%
Black	%	%	%	%	%
Hispanic, Latinx, or Spanish	%	%	%	%	%
Indigenous/Tribal People (domicile-specific)	%	%	%	%	%
Middle Eastern or North African	%	%	%	%	%
White	%	%	%	%	%
Some Other Race or Ethnicity	%	%	%	%	%
Two or More Races or Ethnicities	%	%	%	%	%
Decline to State	%	%	%	%	%
Total	%	%	%	%	100%

If no – due to firm policy, please enter any narrative information you wish to provide:

If no – due to privacy regulations/law, please explain:

What percentage of portfolio decision-makers are military veterans?

What percentage of portfolio decision-makers are disabled?

Additional information regarding the diversity of the portfolio decision-making team you wish to add:

Supplemental diversity and inclusion documentation you wish to add:

Keep in mind that staffing questions in the ESG questionnaire also give managers opportunities to articulate their approach to D&I.

Does your firm have policies that are intended to increase the level of gender and ethnic diversity of senior leadership and investment teams?

If yes, does your firm track KPIs related to staff diversity initiatives?

If yes, do you make your KPI reporting available to external parties?

Does your firm have a mentorship program available for women/minorities?

Has your firm undertaken a gender or ethnic diversity pay-gap study?

If yes, are there policies in place to remedy any deficiencies found?

Does your firm have a pay-parity policy in place?

Does your firm have an ethics code and/or code of conducts?

If yes, how often are updates made?

Does your firm have an explicit sexual harassment policy?

If yes, how often are employees required to review/sign it?

Tell your D&I story through database marketing.



**eVestment Omni
can help.**

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