

CASE STUDY

Australian equity boutique uses eVestment to engage investors and consultants globally

Establishing and maintaining a global presence has been key to the firm's growth strategy.

Bell
ASSET MANAGEMENT

\$2.0B
FIRM AUM

2003
YEAR FOUNDED

4
INSTITUTIONAL FUNDS

Bell Asset Management (BAM) is an Australian-based manager with USD \$2.0B under management. The firm is a global equity boutique with strong performing strategies serving investors internationally, especially in the U.S. pension and Australian superannuation markets.

Establishing a global reach for engagement

According to Rob Sullivan, Managing Director for Distribution and Strategy, Bell Asset Management is growing its network throughout Europe, the U.K., broader Asia and the U.S. by focusing on high-touch engagements with institutional investors and asset consultants.

"Obviously direct engagement is important for [us], but so is eVestment. We take pride in providing complete and timely information to eVestment so investors and consultants, no matter where they are in the world, have immediate access to deep data on our firm and strategies." BAM's outreach also includes distributing thought leadership on its global small- and mid-cap equity expertise and ESG engagement through media and social channels.

BAM began to focus more on expanding its global visibility about five years ago, said Sullivan. "The first thing we did was look at what we were reporting to eVestment and focus on making sure it was complete. Then from that point on, we started to see more 'reviews,' which led to direct investor engagement. It's been an important channel to promote our extensive global equity expertise and has helped us increase our assets under management."

For BAM, establishing and maintaining a global brand presence has been key to the firm's growth strategy.

Using data to engage

As a solutions-focused firm, Bell Asset Management strives to first get an understanding of a potential investor's existing manager mix. This is easy with eVestment Analytics, which includes data on over 26,000 strategies and the ability to pull individual managers into a custom universe to simulate an investor's portfolio. With tools like this, BAM conducts extensive risk and return correlation analyses to see how its strategies complement the prospect's existing manager roster. The firm then uses these insights to engage the investor and consultant at a very detailed level about their actual portfolio. For BAM, it's been an impressive strategy for winning new clients.

"When you're a boutique, reporting to eVestment gives you global reach. I think that is so important for smaller firms. But the analytics are key too – helping you win business by delivering solutions to investors that complement their existing managers."

Tracking engagement

BAM relies on eVestment Advantage to monitor engagement "on a weekly basis," according to Sullivan. "We regularly check eVestment to track the viewership of our products before and after we engage with investors. When we plan road shows in a particular region, for instance, we first assess viewership of our strategies in the region, then monitor for spikes

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in viewership after the road show. This helps us quantify how successfully we're engaging."

BAM also uses viewership data to understand where interest in its products is coming from. As the firm's brand awareness continues to expand globally, locating viewership by geography – and knowing whether it's generated from investor or consultant research activity – has helped BAM further refine its outreach and engagement.

Choosing eVestment

"When we reviewed data sources and platforms, eVestment stood out in relation to our needs," explained Sullivan. "And we maintain our relationship with eVestment because it continues to evolve. Of course, there are the data and analytics capabilities, but we value the insights eVestment provides in other ways too, like reports on institutional trends and interviews with consultants. Content on demand for ESG has been of particular interest to us, as it's a strength of our investment capabilities. All of this just helps us engage with investors and consultants in more and deeper ways."