

Reporting D&I Data to eVestment

Why Report

Research activity of the 1,000+ investment consultants, allocators and asset owners that rely on eVestment shows accelerated use of D&I criteria in manager screens. Users frequently set “data provided = yes” as a filter, so managers that do not provide data are very likely falling out of screens.

Firm-Level Questions

- 1 Log into eVestment.com > Input > Submit Data > Submit by Product/Firm > choose firm name
- 2 Click on the Ownership section and complete the fields
- 3 Click on the Regulatory & ESG section, scroll to Staffing and complete the fields

Product-Level Questions

- 1 Log into eVestment.com > Input > Submit Data > Submit by Product/Firm > choose product name
- 2 Click on the Diversity & Inclusion section and complete the fields

Need help?

data@evestment.com

Telling Your D&I Story: Best Practices

Don't skip text boxes.

These give you multiple opportunities to narrate what your firm is doing to promote diversity, equity and inclusion. Consultants, allocators and asset owners express considerable interest in the D&I policies and programs managers are implementing.

If you can't provide demographic breakdowns of your portfolio teams, explain why.

Consultants, allocators and asset owners understand that it's challenging for some managers to collect demographic data. The questionnaire provides opportunities to explain any firm policy or regulation that may be hindering your ability to collect or report demographic data. It also invites you to describe the diversity of the portfolio management team even where you cannot provide demographic breakdowns.

Educate your firm on the need to provide some level of D&I responses.

Failing to respond to any D&I questions may inadvertently suggest to researchers that diversity, equity and inclusion are not focus areas for your firm. Take advantage of the opportunity to show they are by explaining what you're already doing to promote diversity.