



# eVestment Insights

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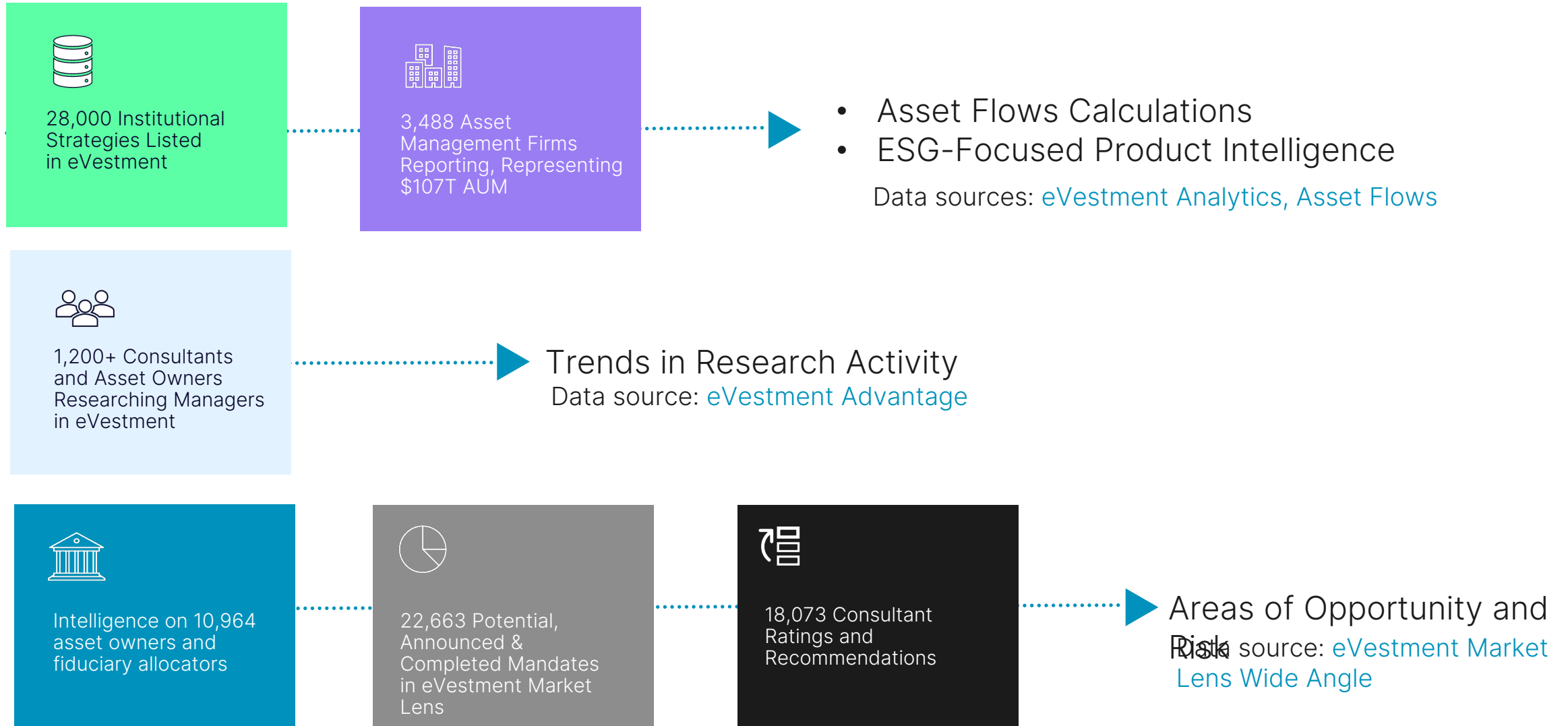
THE BIG PICTURE:  
Quarterly Briefing on Global Institutional Trends

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25 May 2023

## Introduction

# Underlying This Trends Analysis: eVestment Data



# Global Asset Movement

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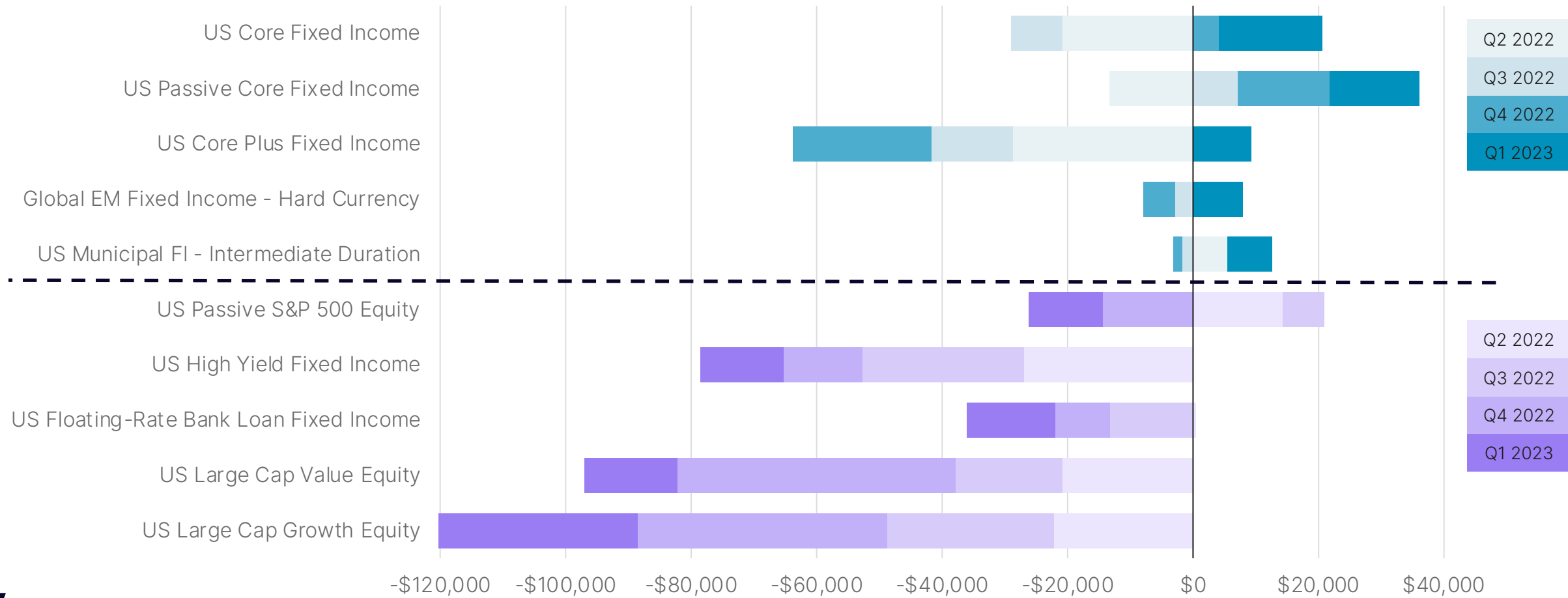


## Global Asset Movement

# Regional Flow Drivers: North America Investors

Data Source: [eVestment Asset Flows](#)  
Quarters Through Q1 2023

Net Flows Last Four

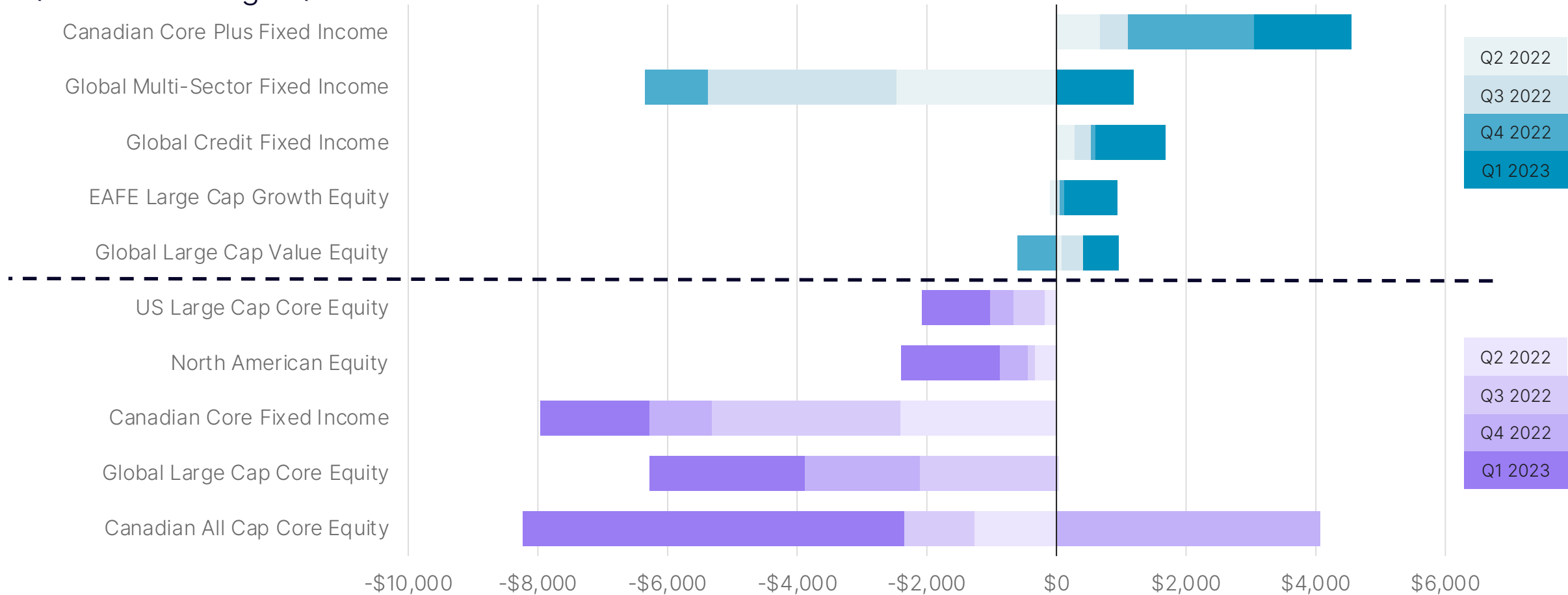


## Global Asset Movement

# Country Flow Drivers: Canada Investors

Data Source: [eVestment Asset Flows](#)  
Quarters Through Q1 2023

Net Flows Last Four

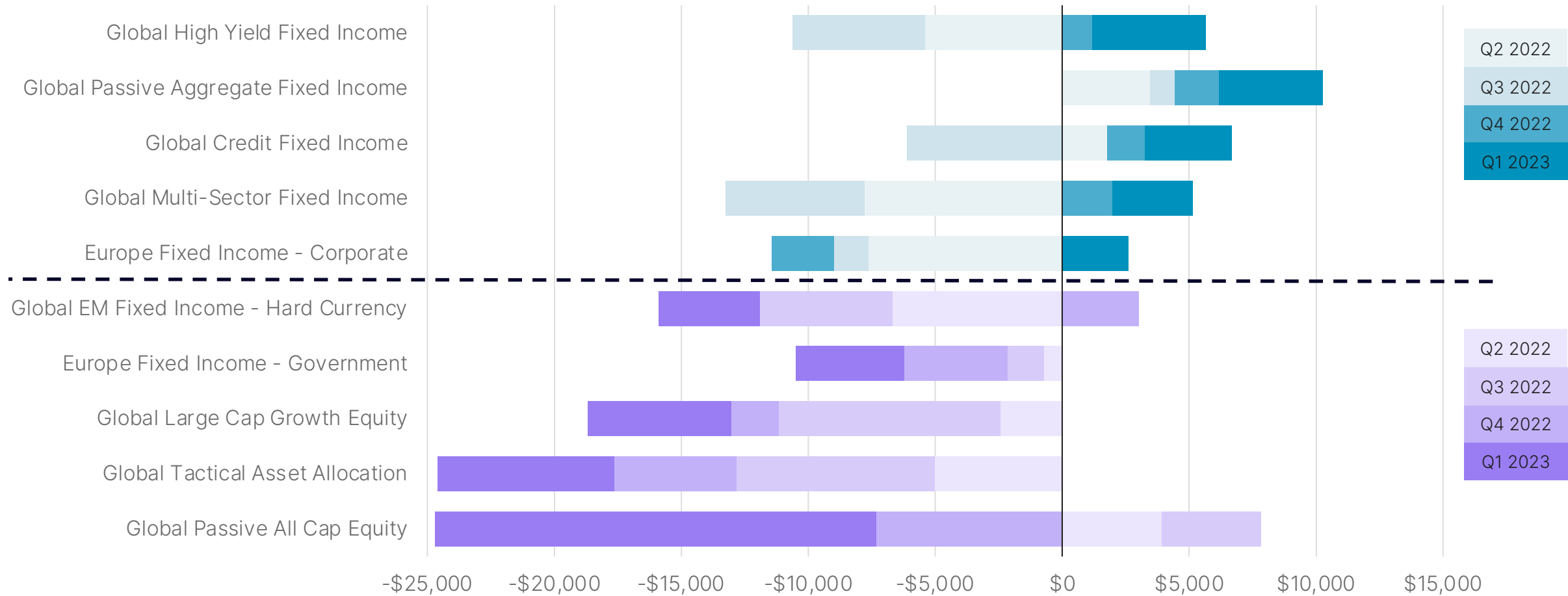


## Global Asset Movement

# Regional Flow Drivers: EMEA Investors

Data Source: [eVestment Asset Flows](#)  
Quarters Through Q1 2023

Net Flows Last Four

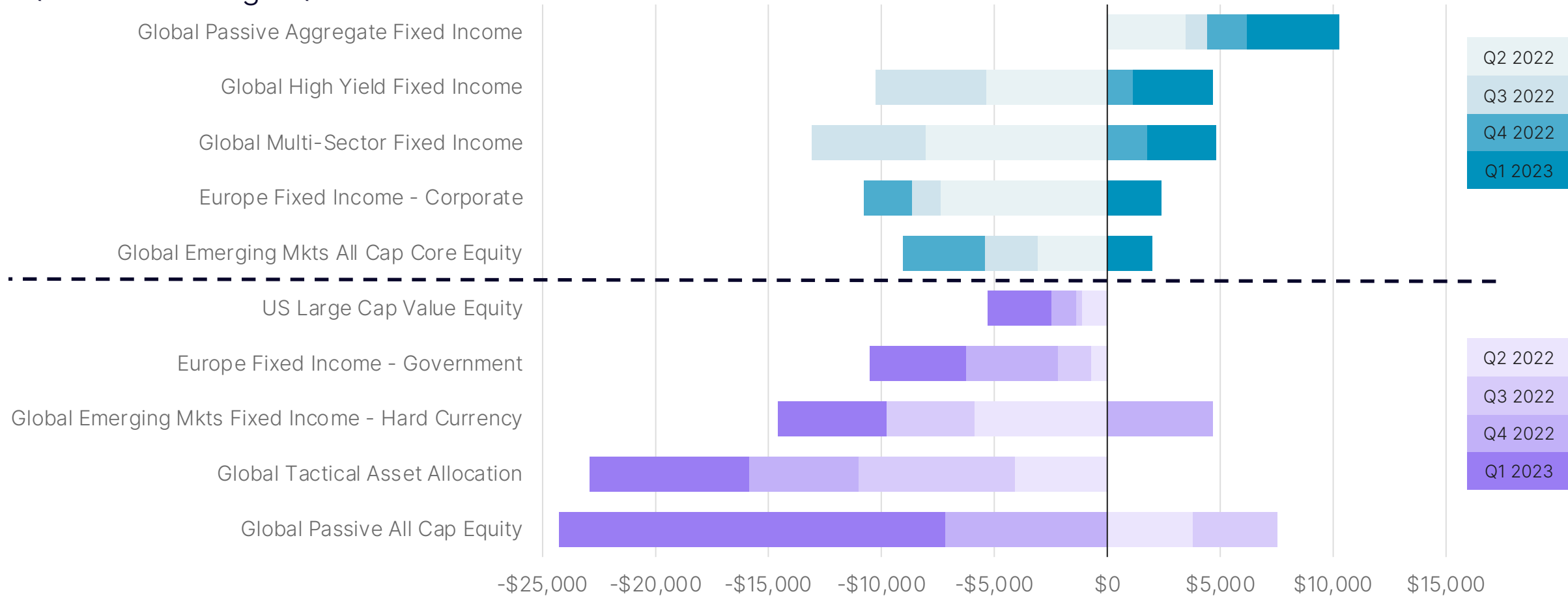


## Global Asset Movement

# Regional Flow Drivers: Europe ex-UK Investors

Data Source: [eVestment Asset Flows](#)  
 Quarters Through Q1 2023

Net Flows Last Four

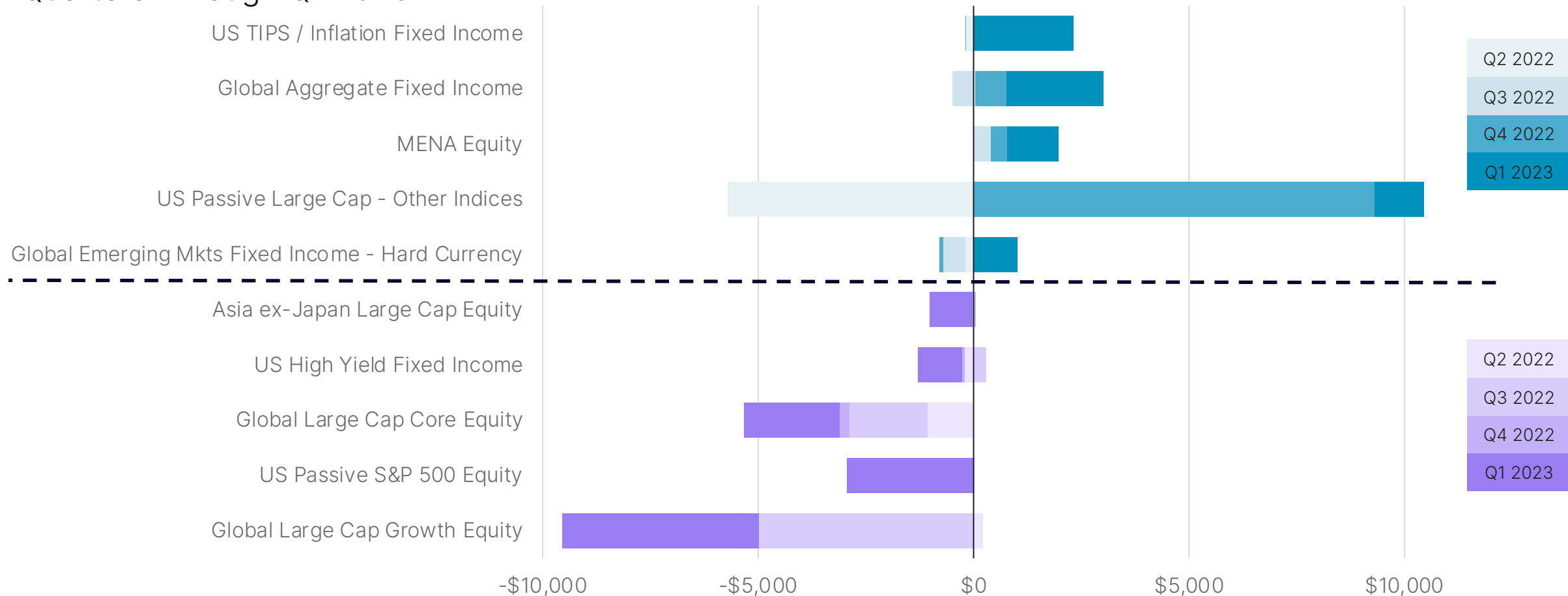


## Global Asset Movement

# Regional Flow Drivers: Middle East/Africa Investors

Data Source: [eVestment Asset Flows](#)  
Quarters Through Q1 2023

Net Flows Last Four



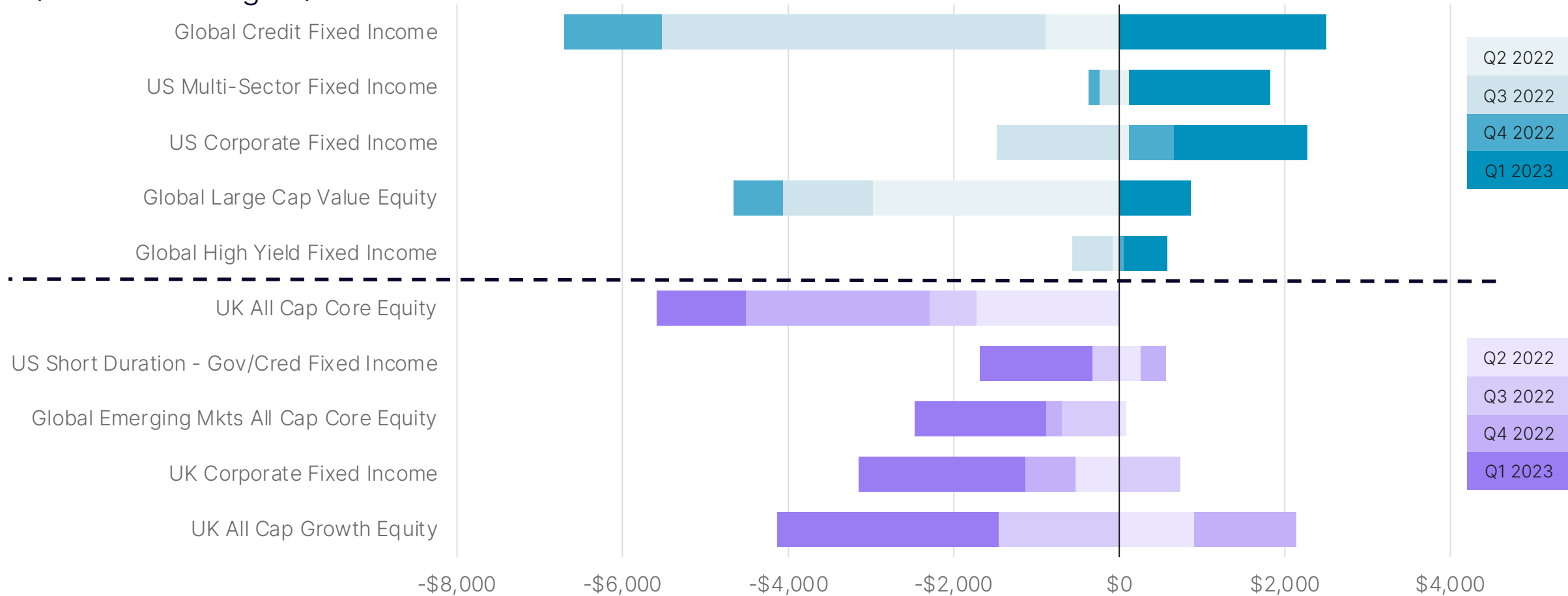


## Global Asset Movement

# Country Flow Drivers: UK Investors

Data Source: [eVestment Asset Flows](#)  
Quarters Through Q1 2023

Net Flows Last Four

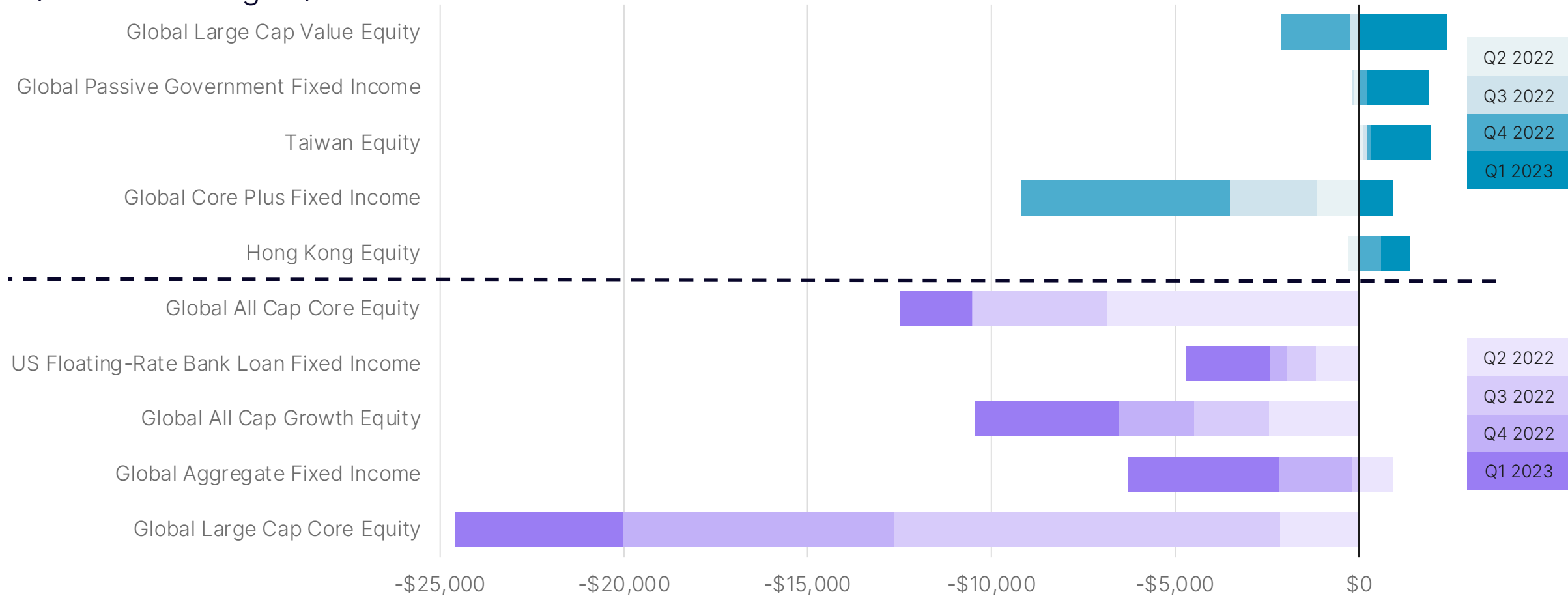


## Global Asset Movement

# Regional Flow Drivers: APAC Investors

Data Source: [eVestment Asset Flows](#)  
 Quarters Through Q1 2023

Net Flows Last Four

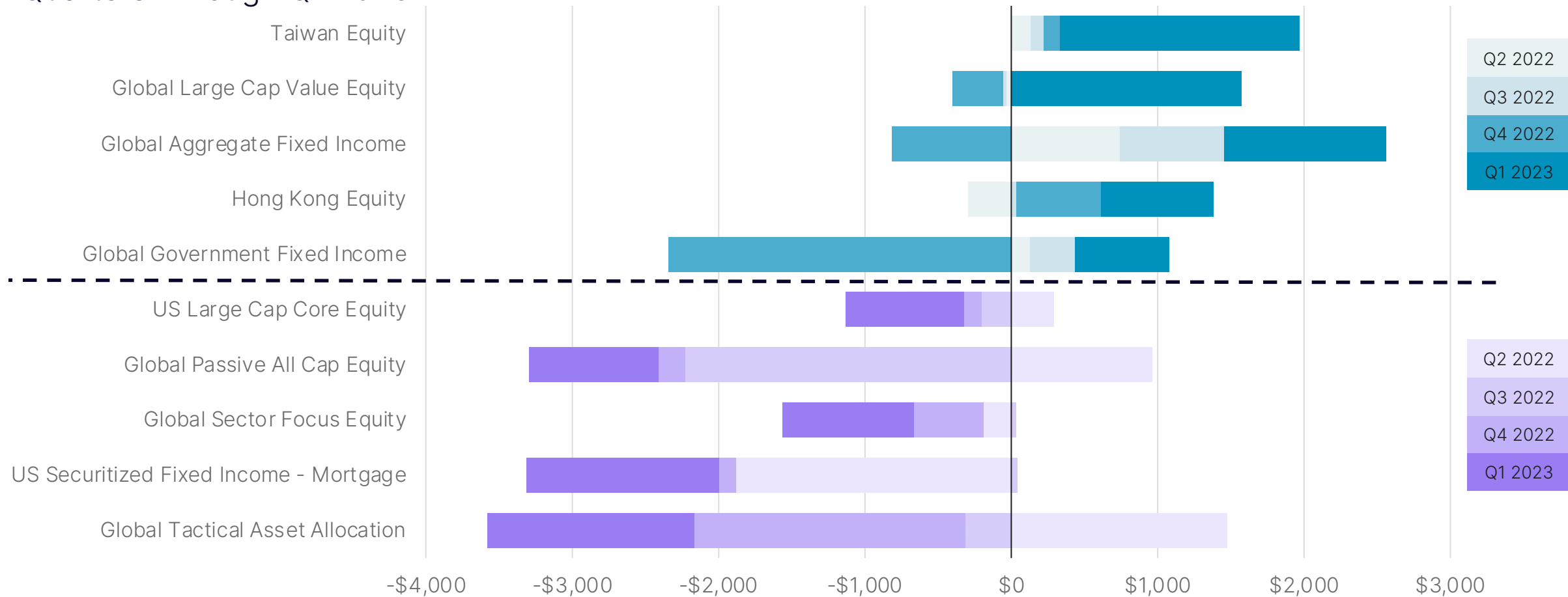


## Global Asset Movement

# Regional Flow Drivers: Asia ex-Japan Investors

Data Source: [eVestment Asset Flows](#)  
Quarters Through Q1 2023

Net Flows Last Four

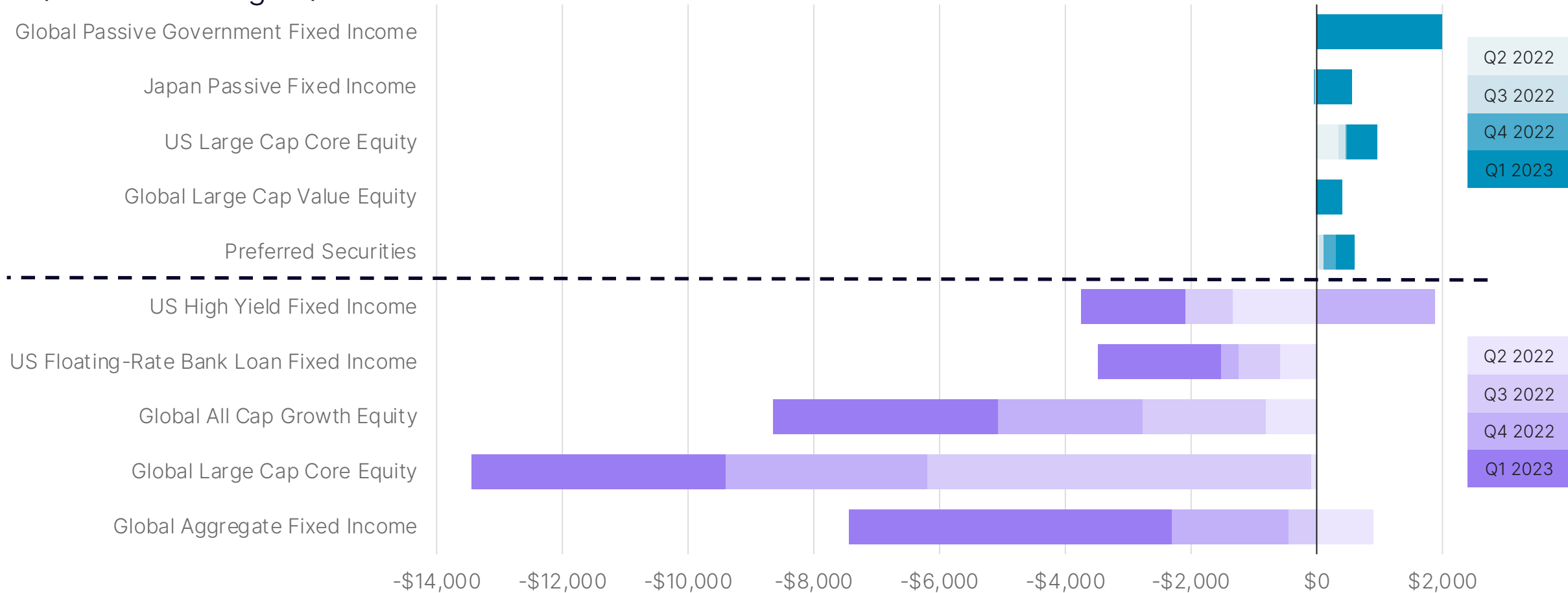


## Global Asset Movement

# Country Flow Drivers: Japan Investors

Data Source: [eVestment Asset Flows](#)  
Quarters Through Q1 2023

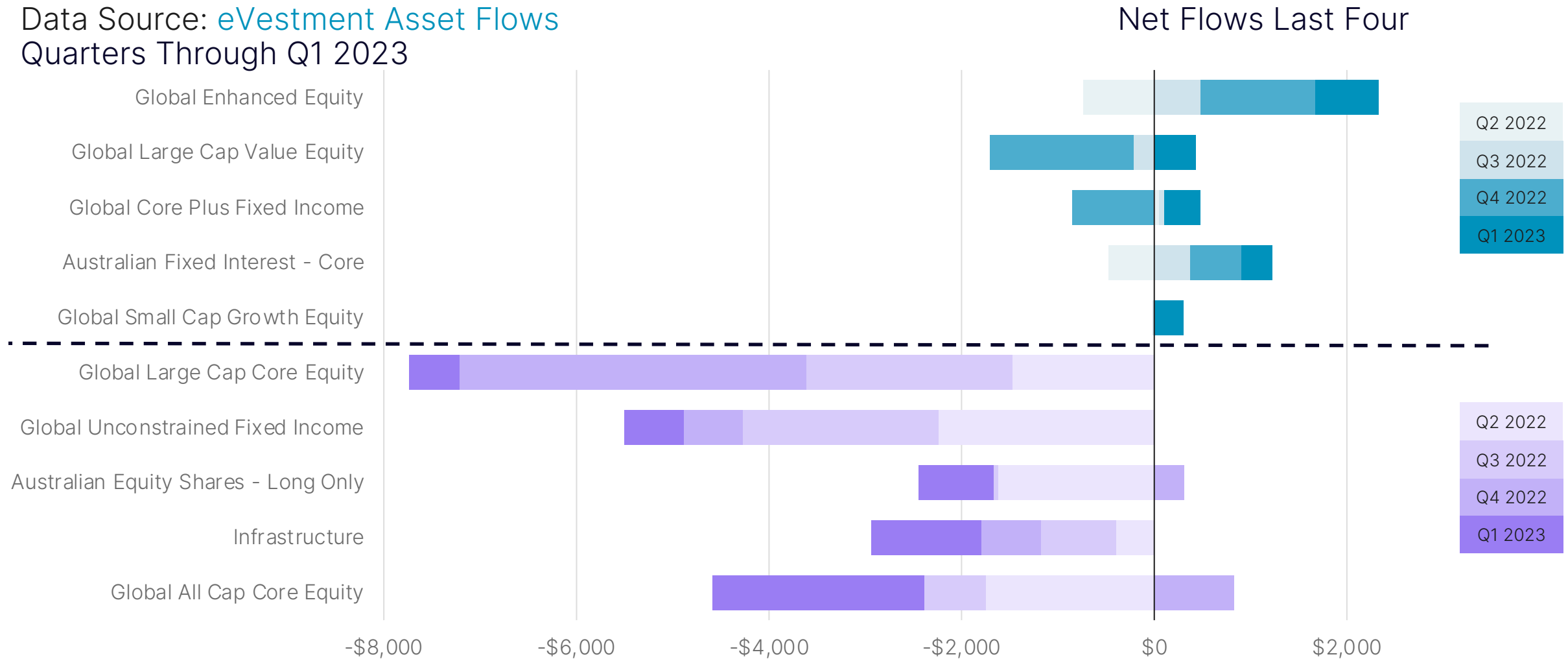
Net Flows Last Four



## Global Asset Movement

# Country Flow Drivers: Australia Investors

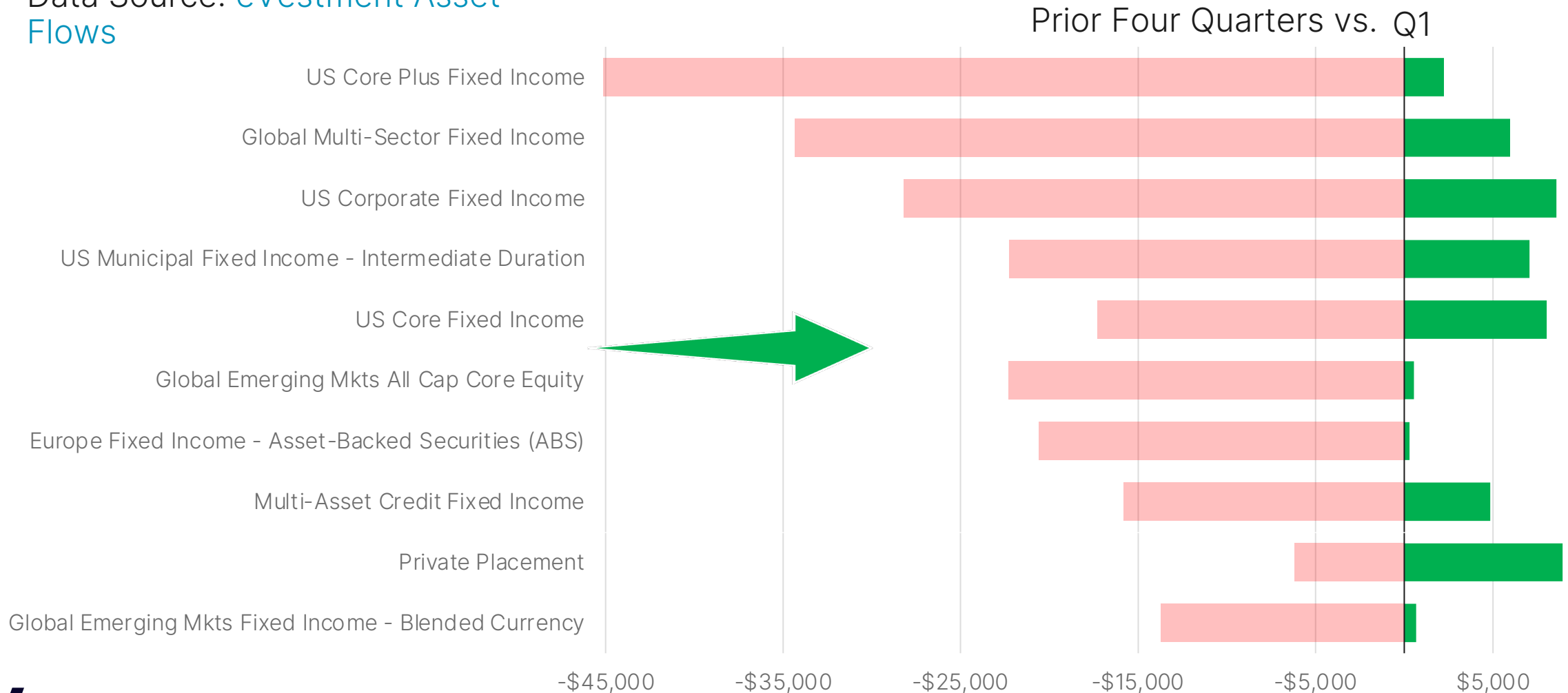
Data Source: [eVestment Asset Flows](#)  
Quarters Through Q1 2023



## Global Asset Movement

# Largest Shifts to Institutional Net Inflows

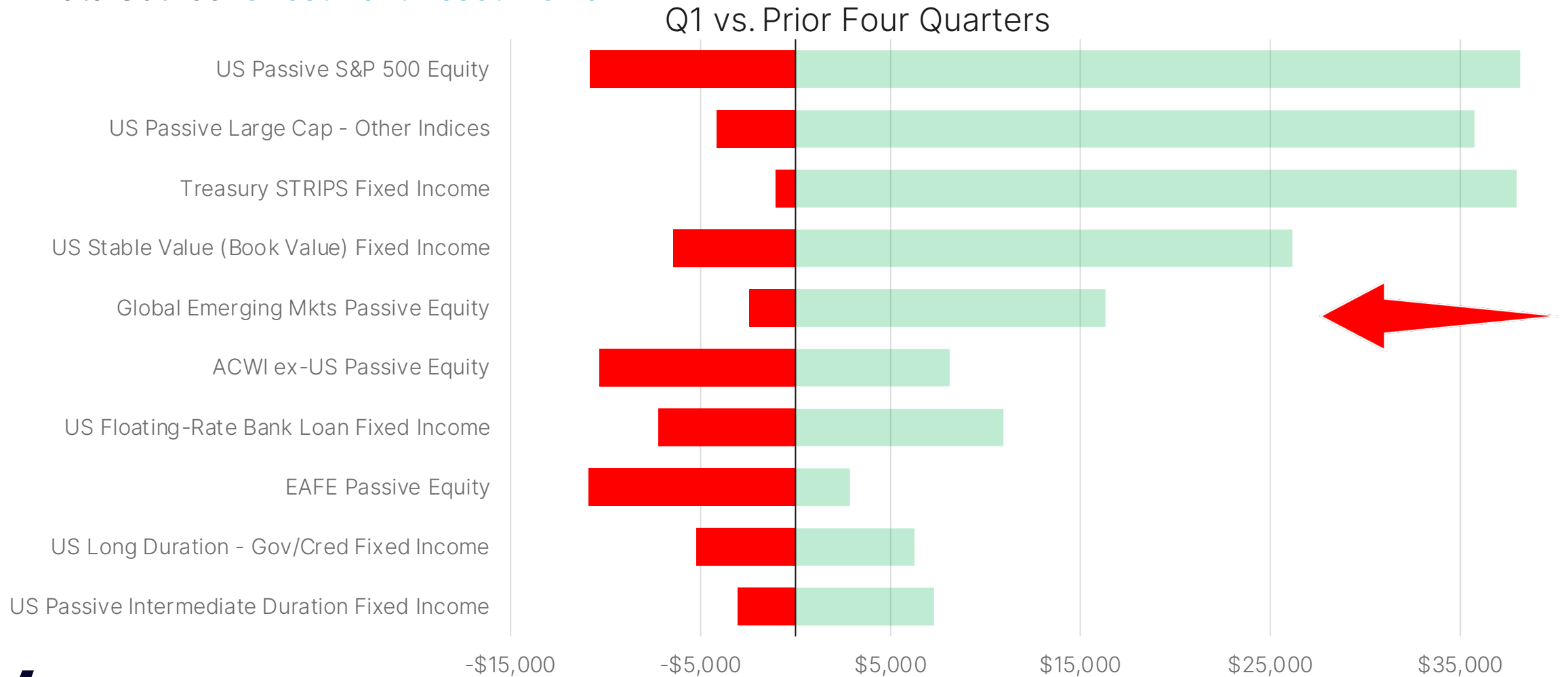
Data Source: [eVestment Asset Flows](#)



## Global Asset Movement

# Largest Shifts to Institutional Net Outflows

Data Source: [eVestment Asset Flows](#)



# Universes Seeing Significant Research from Consultants

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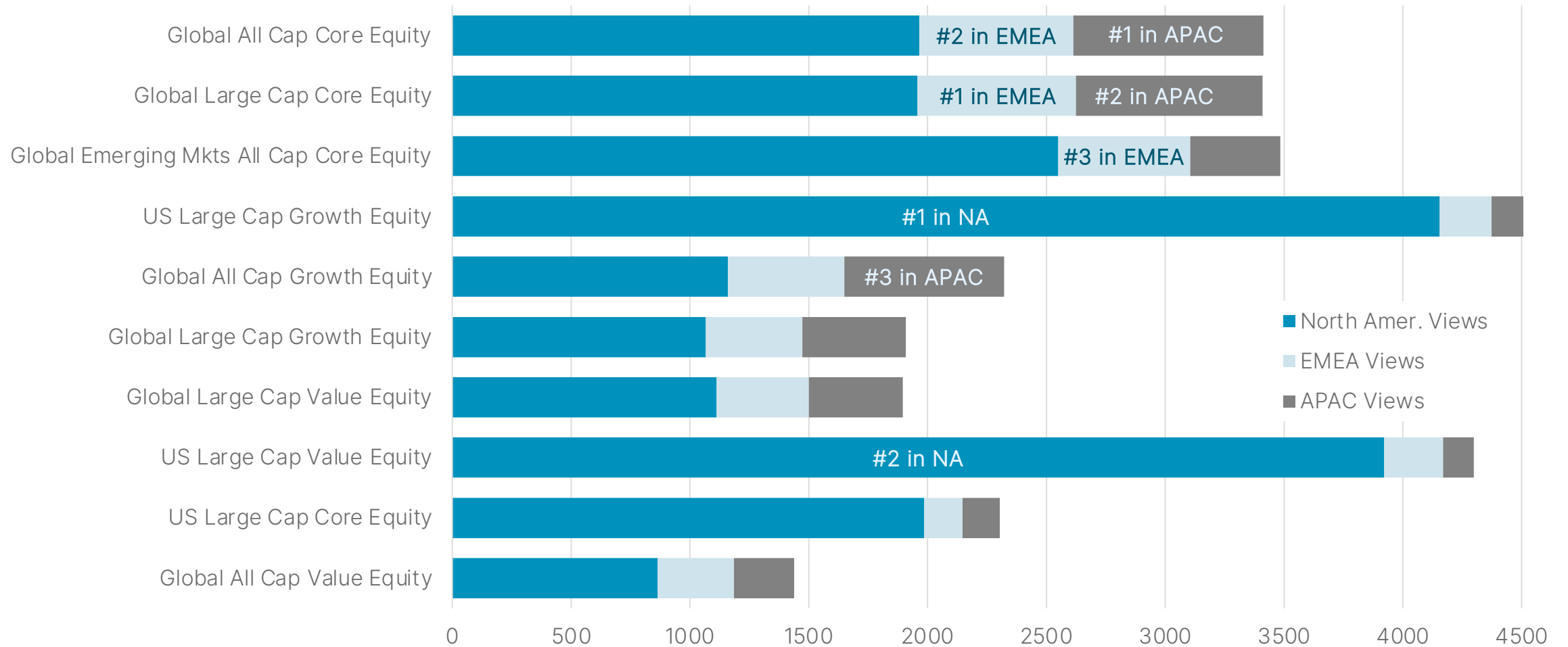




## Consultant Research Activity

# Common Areas of Focus for Consultants Across Regions Q1

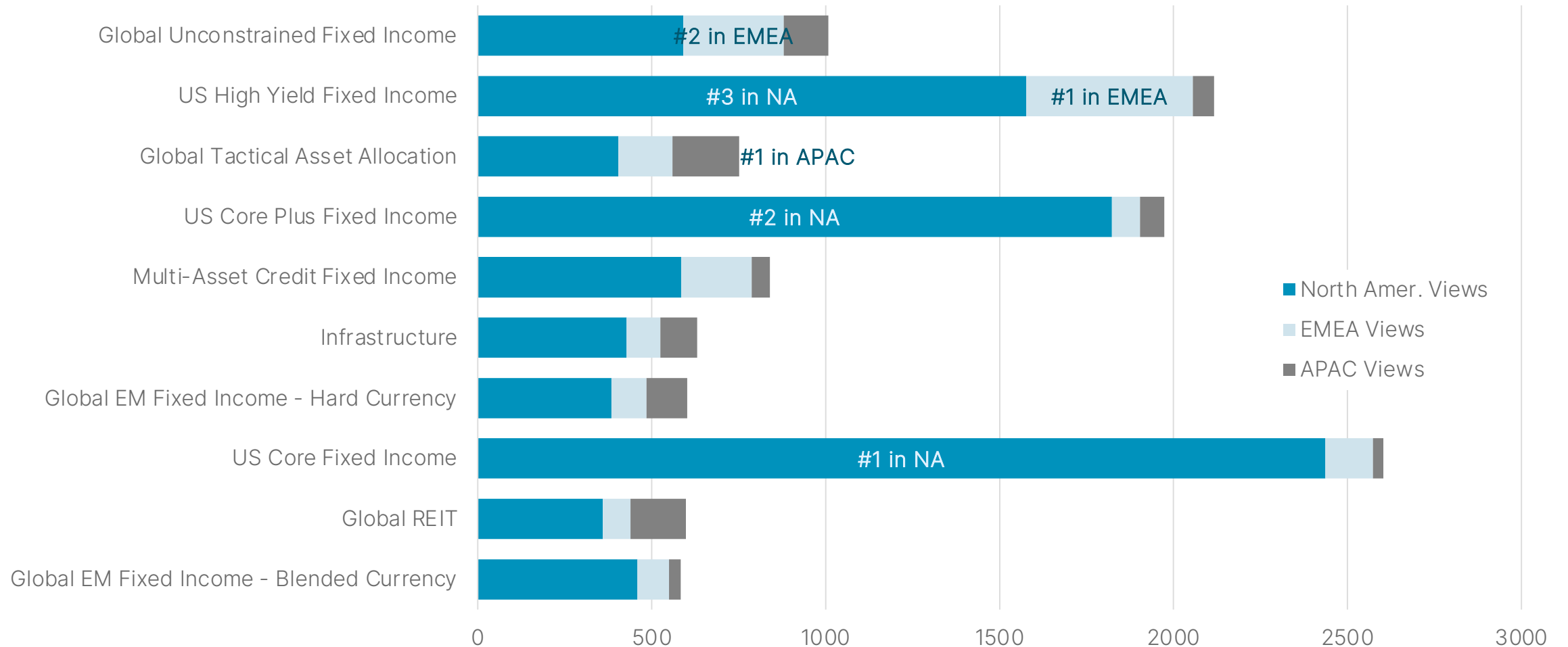
Data Source: [eVestment Advantage](#)



## Consultant Research Activity

# Common Areas of Focus for Consultants Across Regions (ex-Traditional Equity) Q1

Data Source: [eVestment Advantage](#)



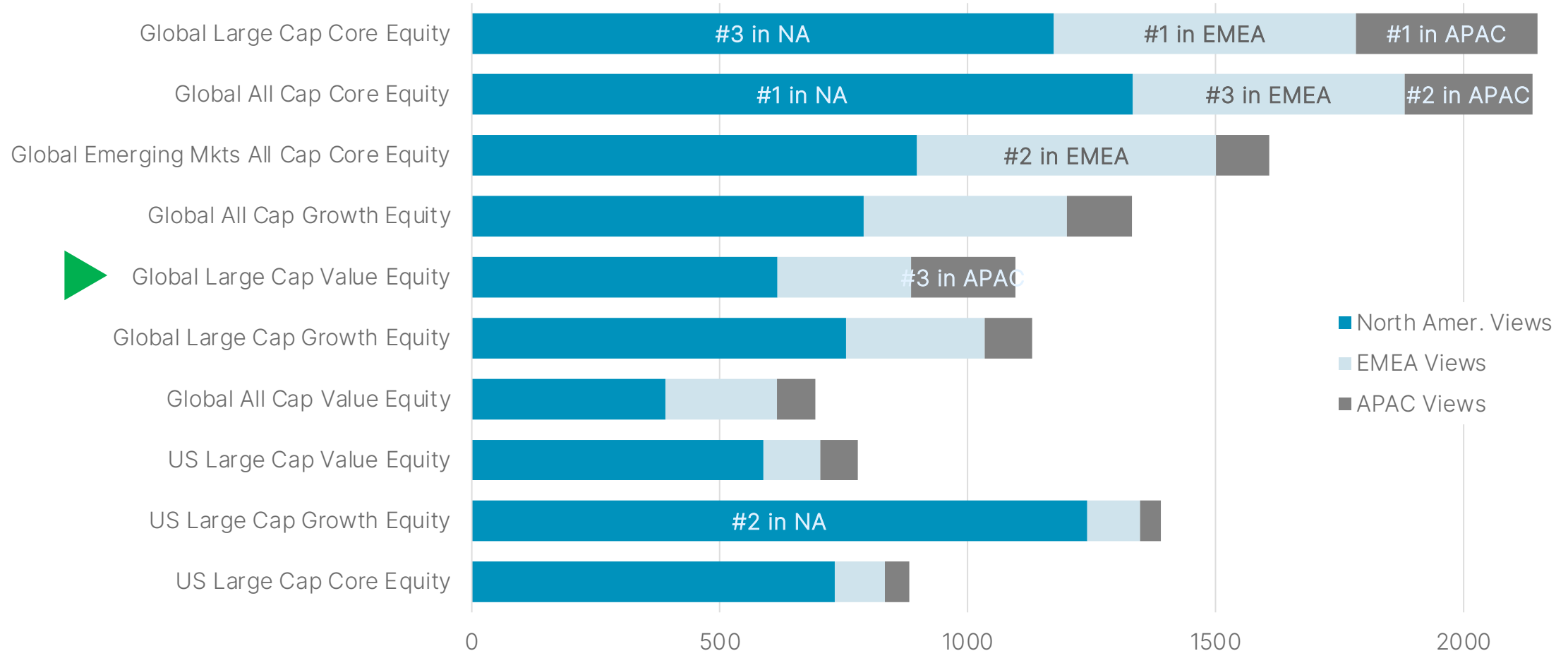
# Universes Seeing Significant Research from Investors

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## Investor Research Activity

Investors shared the focus areas in equity of consultants, with one exception in QI.

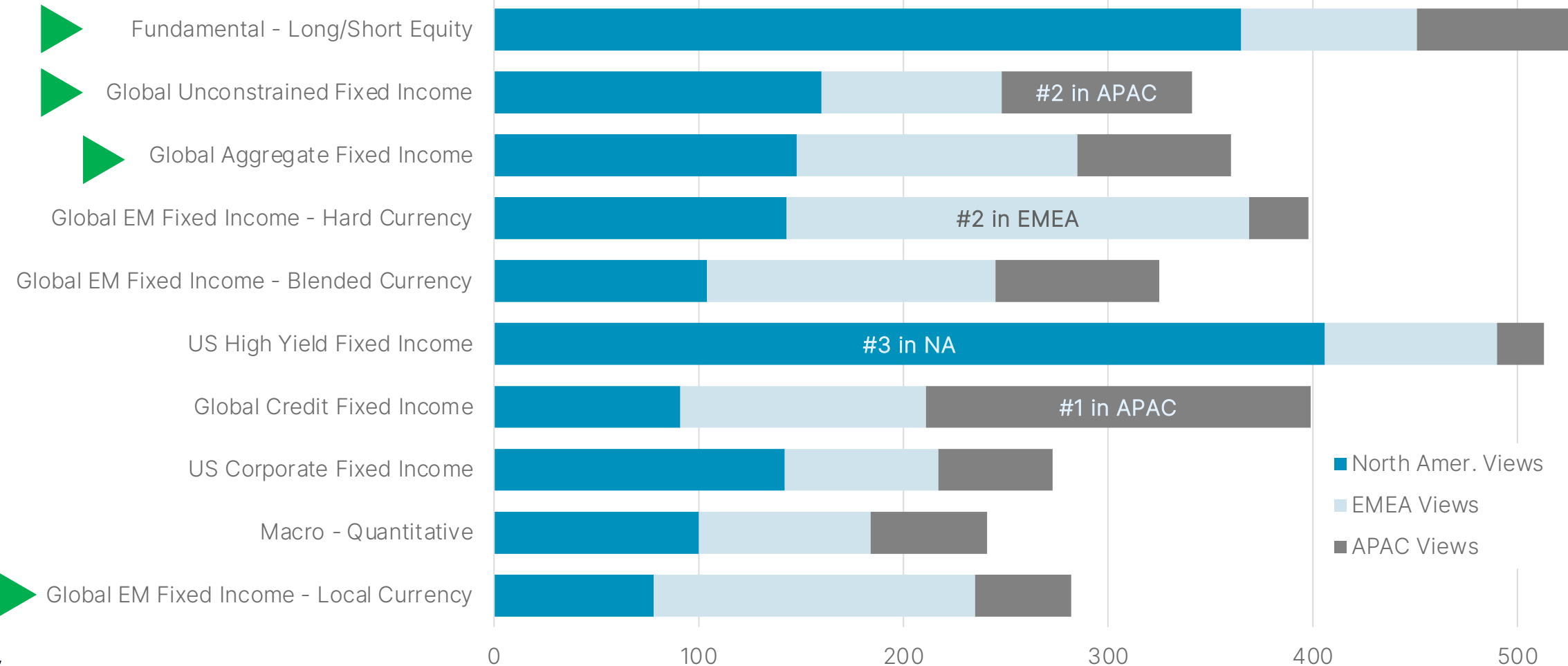
Data Source: [eVestment Advantage](#)



## Investor Research Activity

Outside of traditional equity, investor focus areas differed from those of consultants in four areas in Q1.

Data Source: [eVestment Advantage](#)

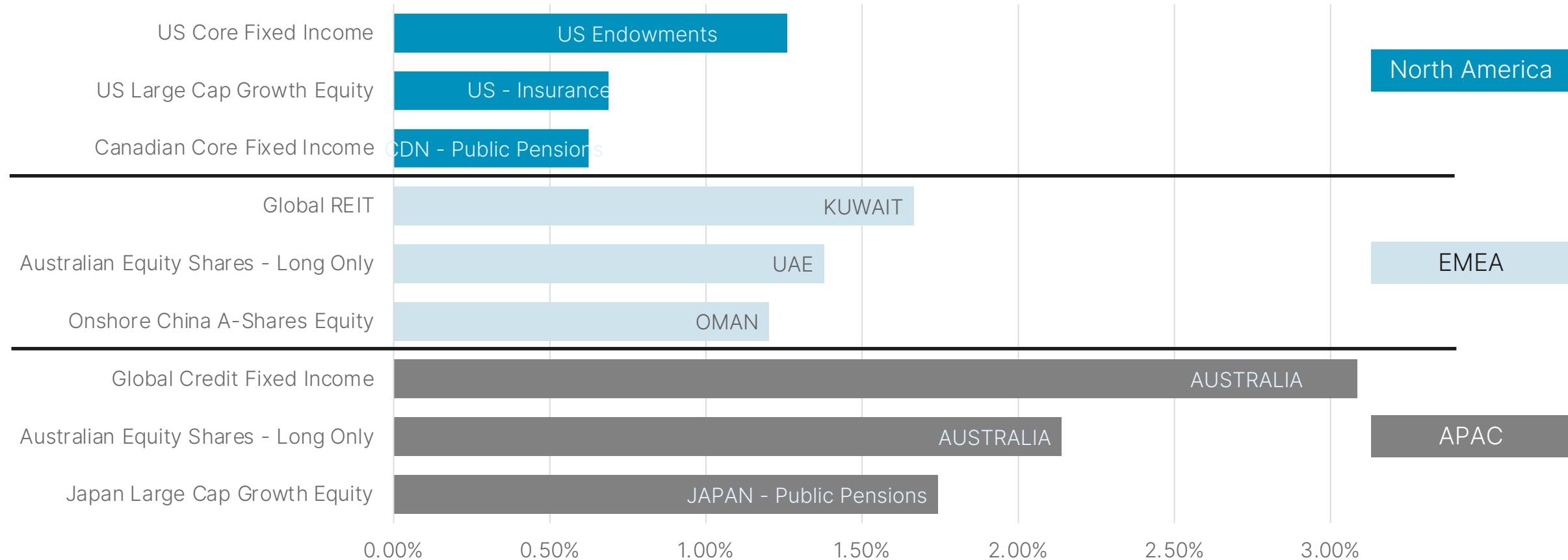


## Investor Research Activity

# Notable Increases in Investor Interest

Data Source: [eVestment Advantage](#)

Q1 2023 vs Prior Four Quarters



# ESG-Focused Strategies

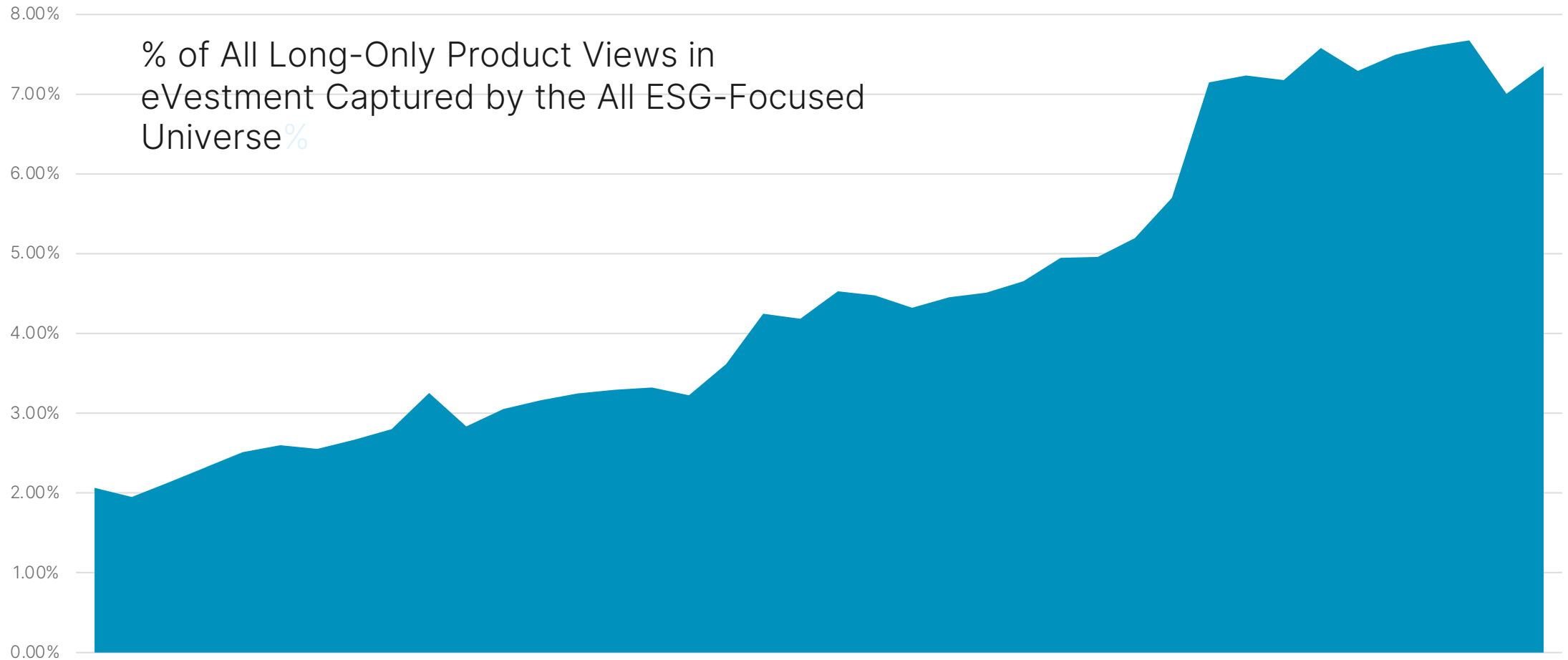
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## Interest in ESG-focused Strategies

Consultant and investor research into ESG-focused strategies remains high.

Data Source: [eVestment Advantage](#)



Last Ten Years through Q1 2023

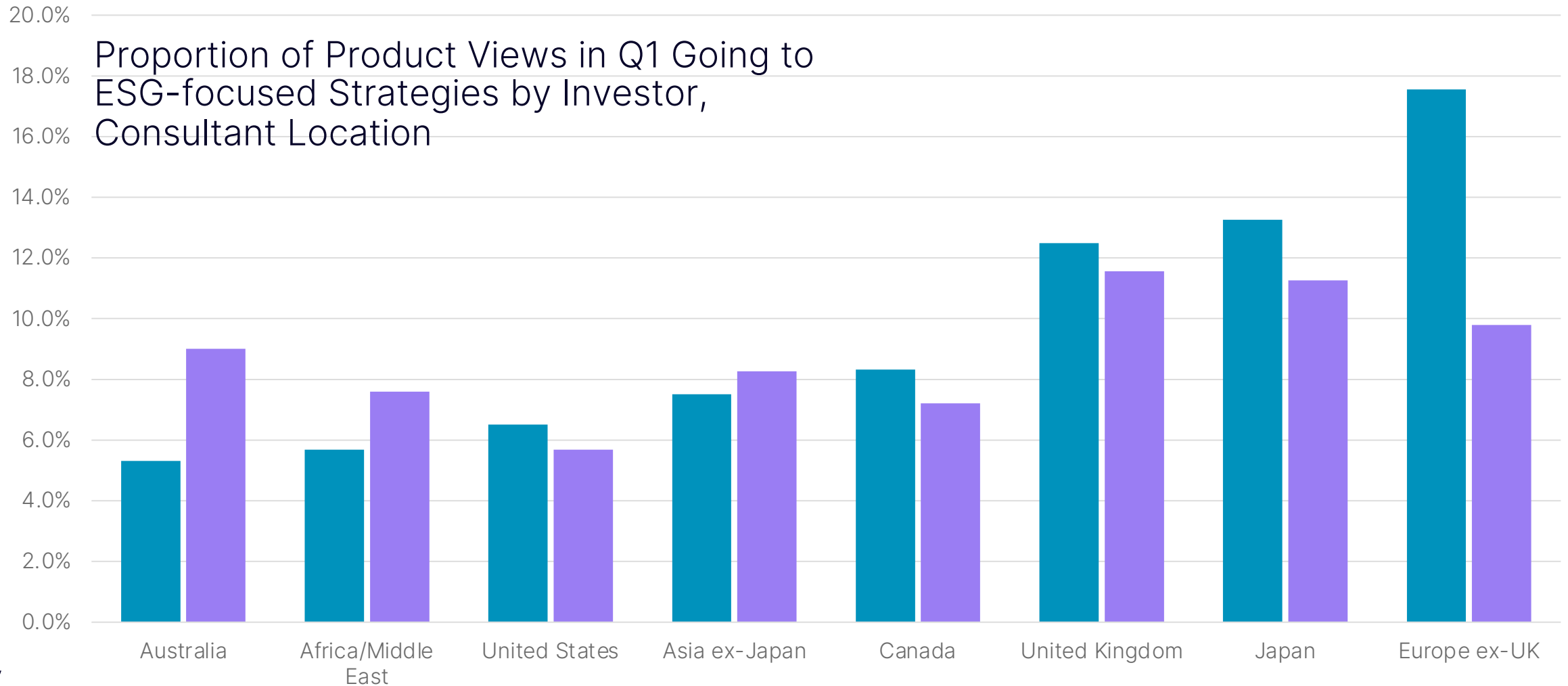




## Interest in ESG-focused Strategies

Focus on ESG varies significantly across the world.

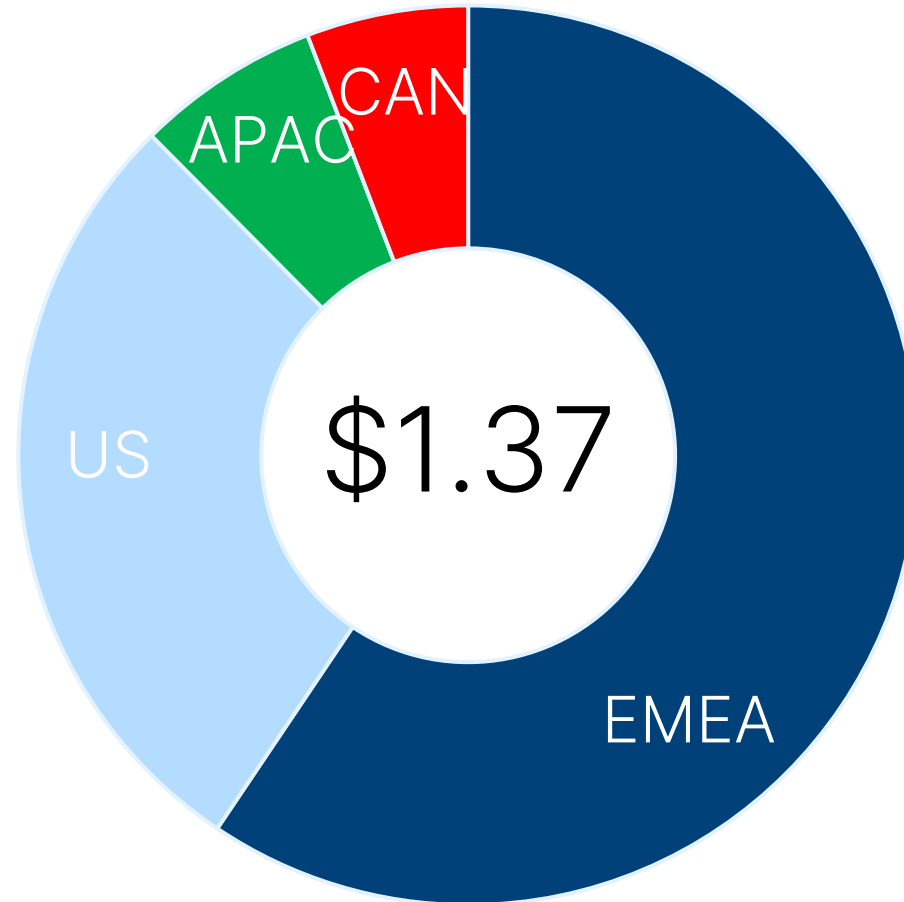
Data Source: [eVestment Advantage](#)



## Interest in ESG-focused Strategies

# AUM in ESG-focused Strategies by Investor Domicile Q1 2023

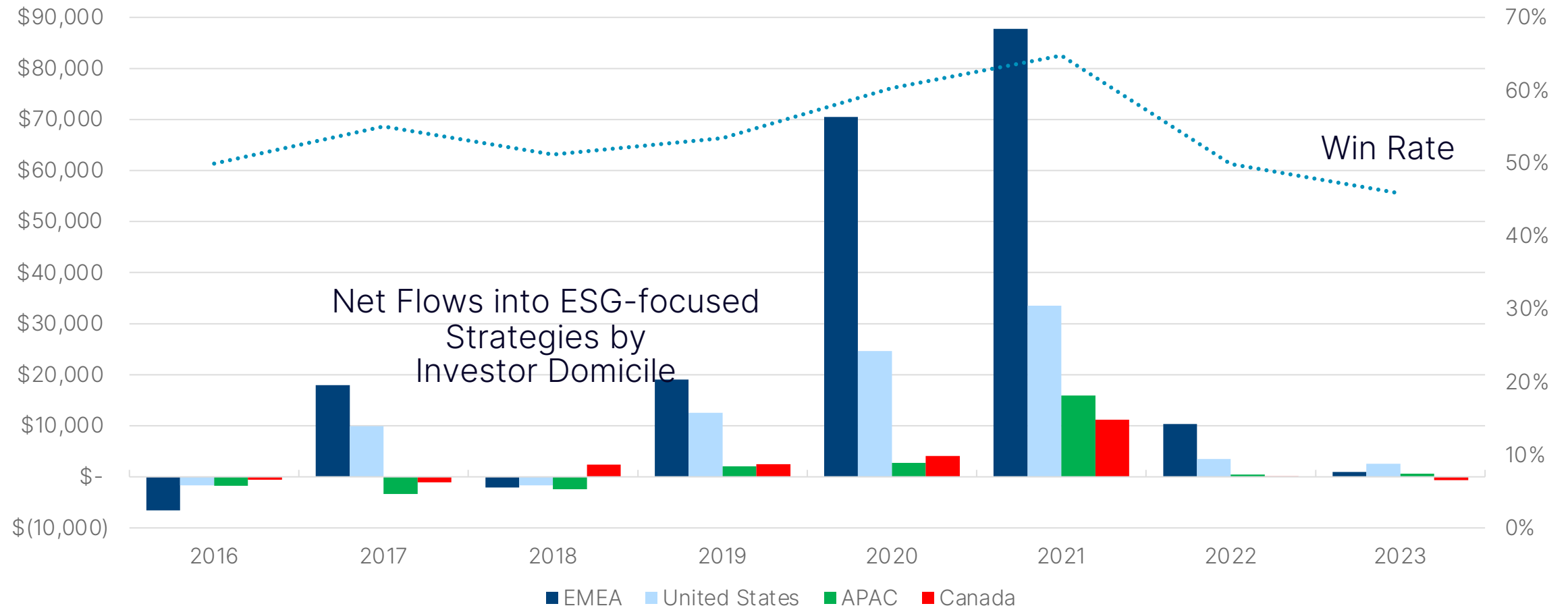
Data Sources: [eVestment Analytics](#)



## Interest in ESG-focused Strategies

Flows from US investors are already in line with all of 2022. A falling win rate means competition for flows has been tightening since 2021.

Data Sources: [eVestment Analytics](#), [Asset Flows](#)



# Areas of Opportunity: UK Public Schemes

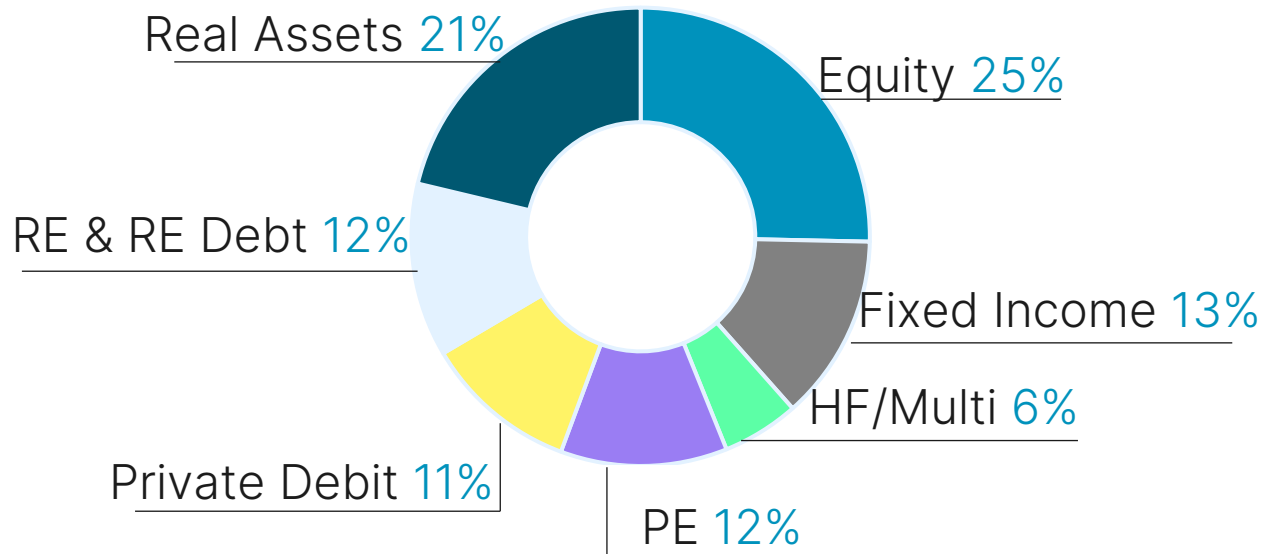
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## UK Public Schemes: Recent Mandates and Ongoing Opportunities

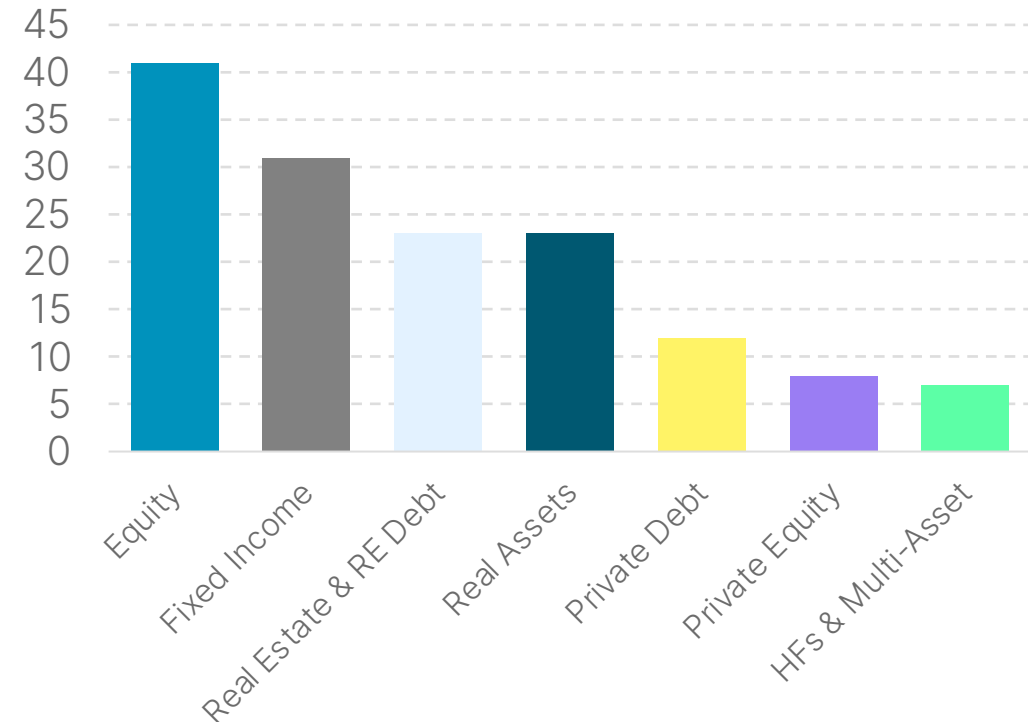
Real assets are on par with equity allocations, and private markets account for at least 56% of tenders.

Data Source: [eVestment Market Lens](#)

221 Completed Tenders  
Last 12 Months



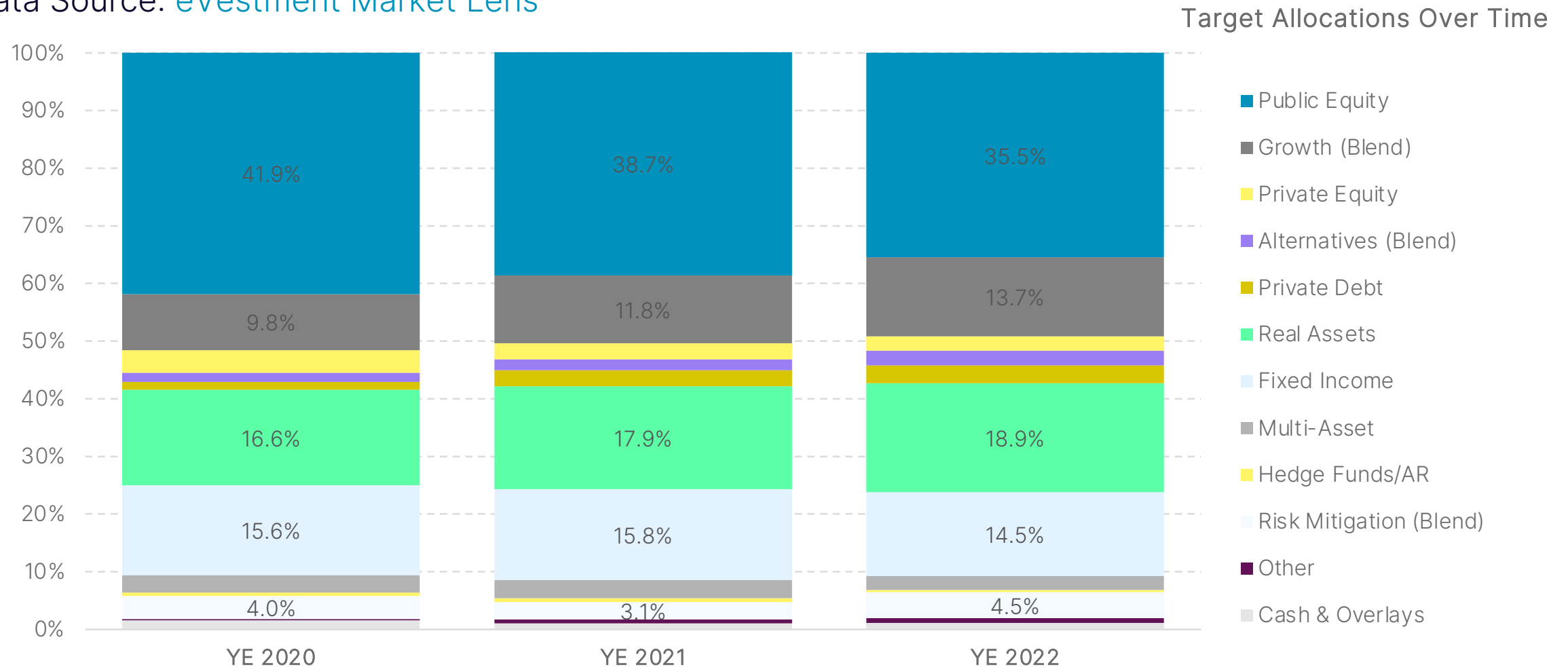
Open & Potential Tenders



## UK Public Schemes: Target Allocations

Reductions to public equity and traditional fixed income are being offset by increases to real assets and growth strategies.

Data Source: [eVestment Market Lens](#)



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