



Institutional Trends

Q1 2021

Broadcast: 20 May 2021

Today's Speakers



Nat Kellogg

President & Director of Manager Search

Marquette Associates



John Molesphini

Global Head of Institutional Insights

Nasdaq



Michele Shauf

Chief Marketing Officer

eVestment

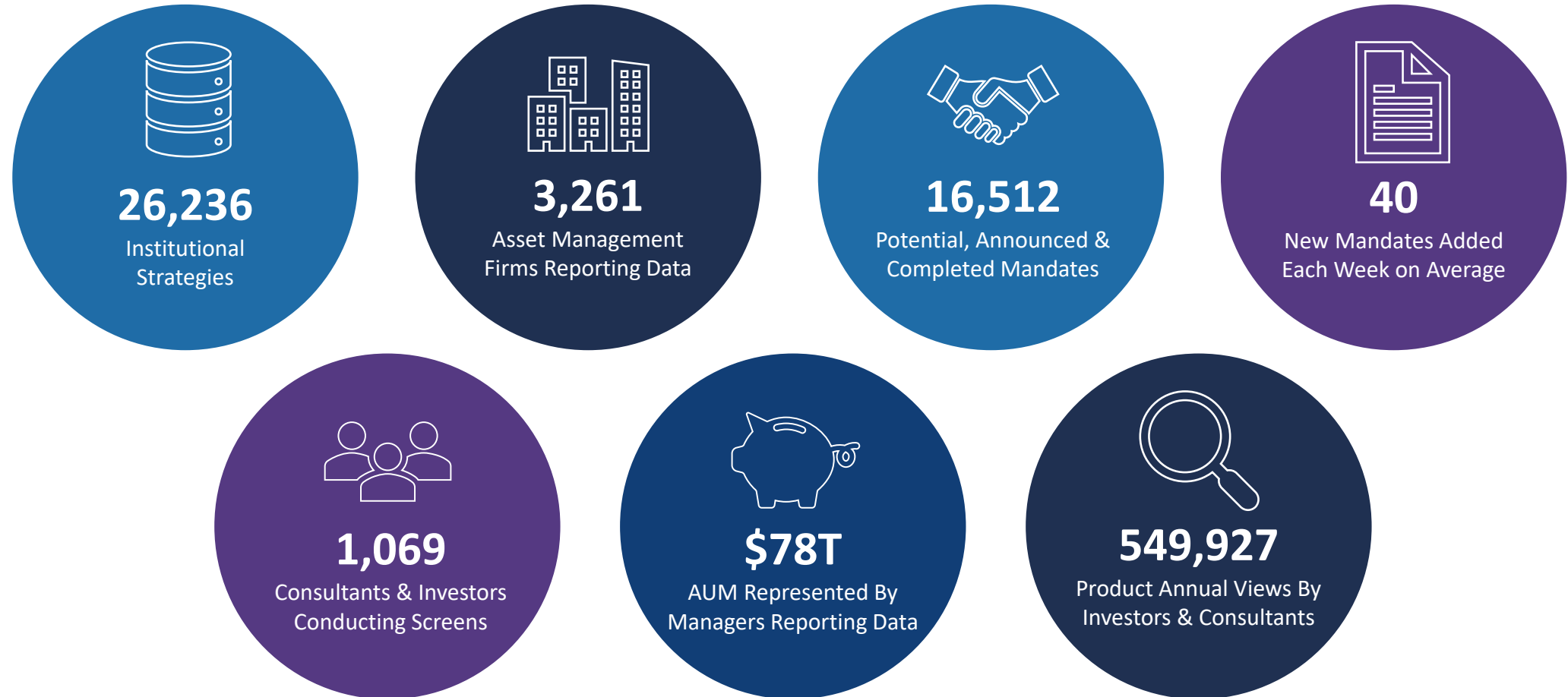
A Nasdaq Platform

Today's Briefing

1. Global Asset Movement & Regional Drivers
2. Investor Viewership: Regional Concentration, Global Similarities & Rising Interests
3. Global Risks & Opportunities
4. Update on ESG

Underlying This Trends Analysis

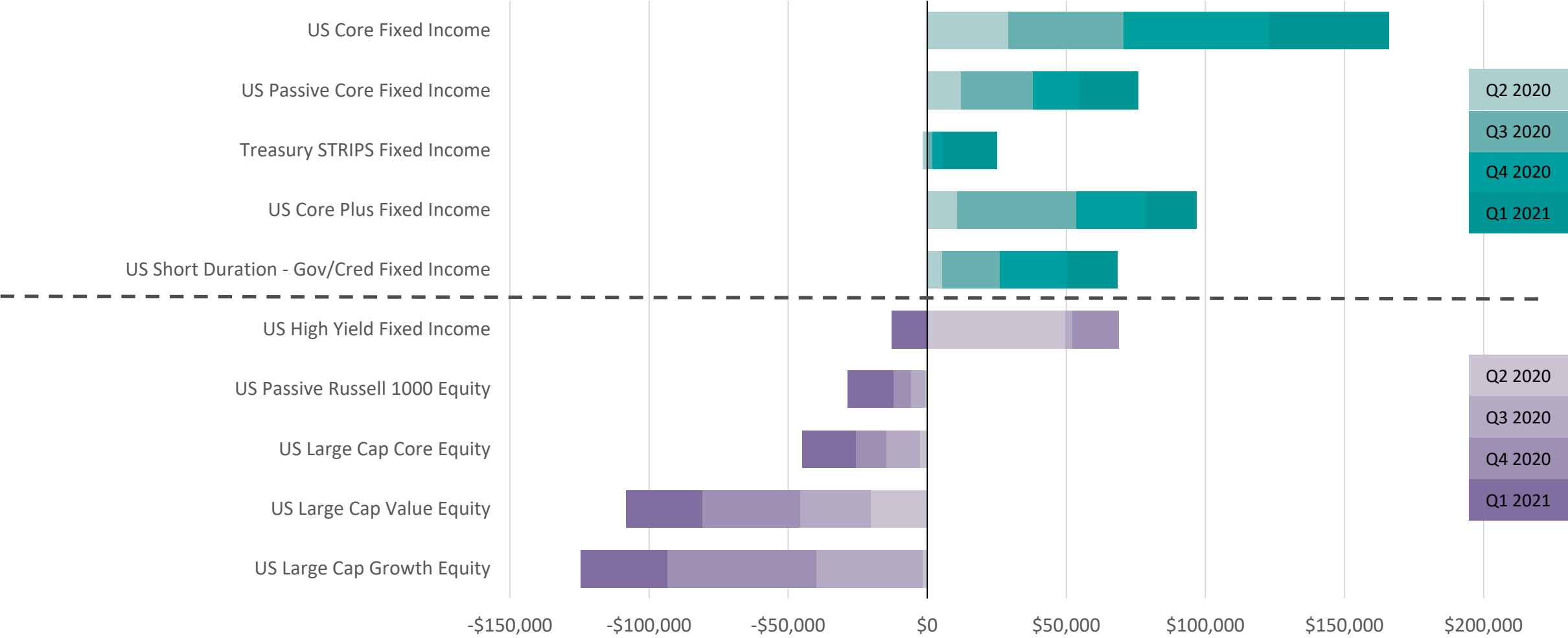
Source: eVestment, Updated Apr 2021. All data presented in USD Millions.



Global Asset Movement

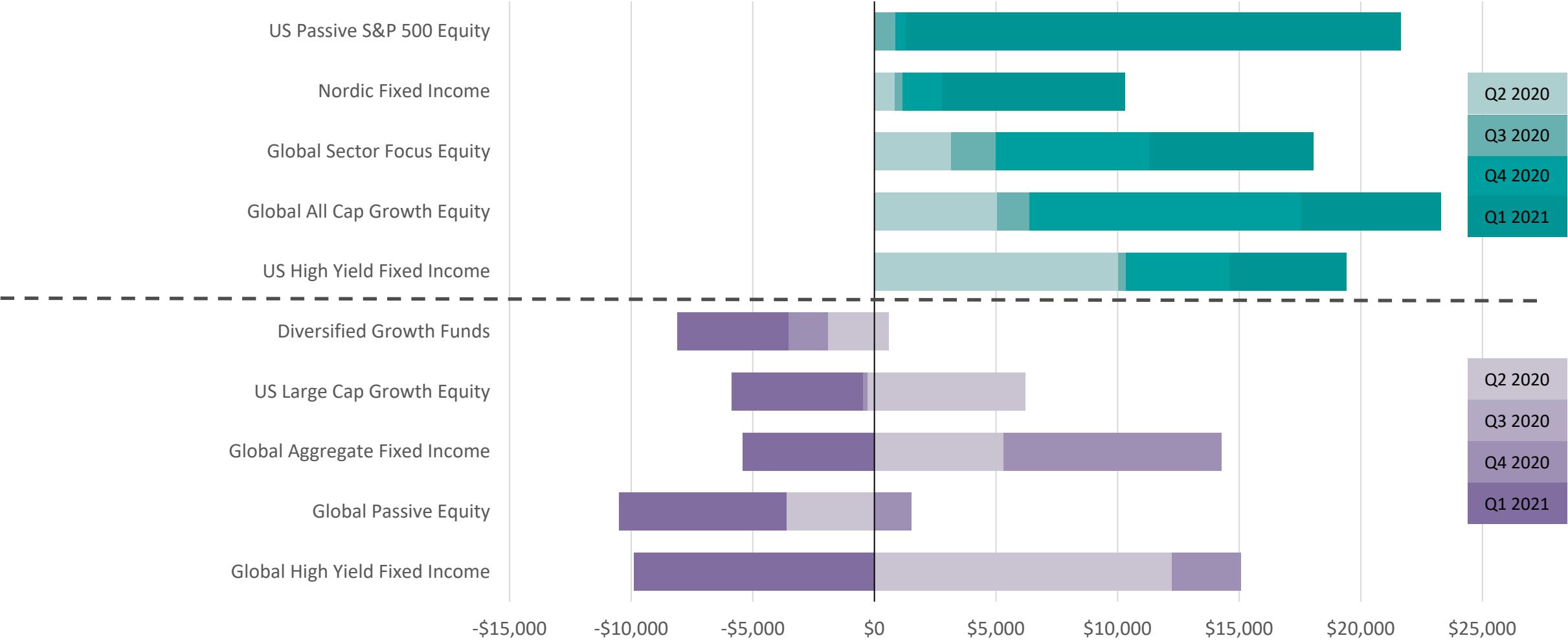
Regional Flow Drivers: North America Investors

Source: eVestment Asset Flows, Net Flows Last 4 Quarters through Q1 2021



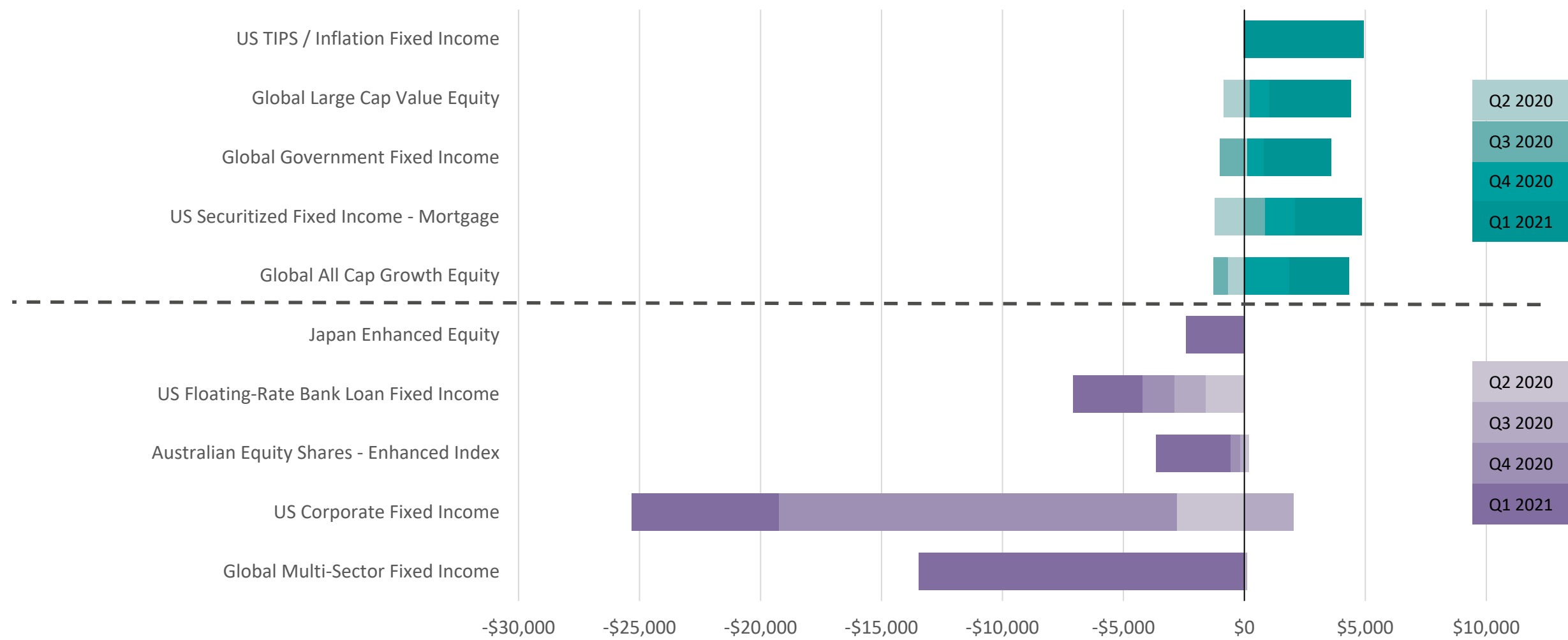
Regional Flow Drivers: EMEA Investors

Source: eVestment Asset Flows, Net Flows Last 4 Quarters through Q1 2021



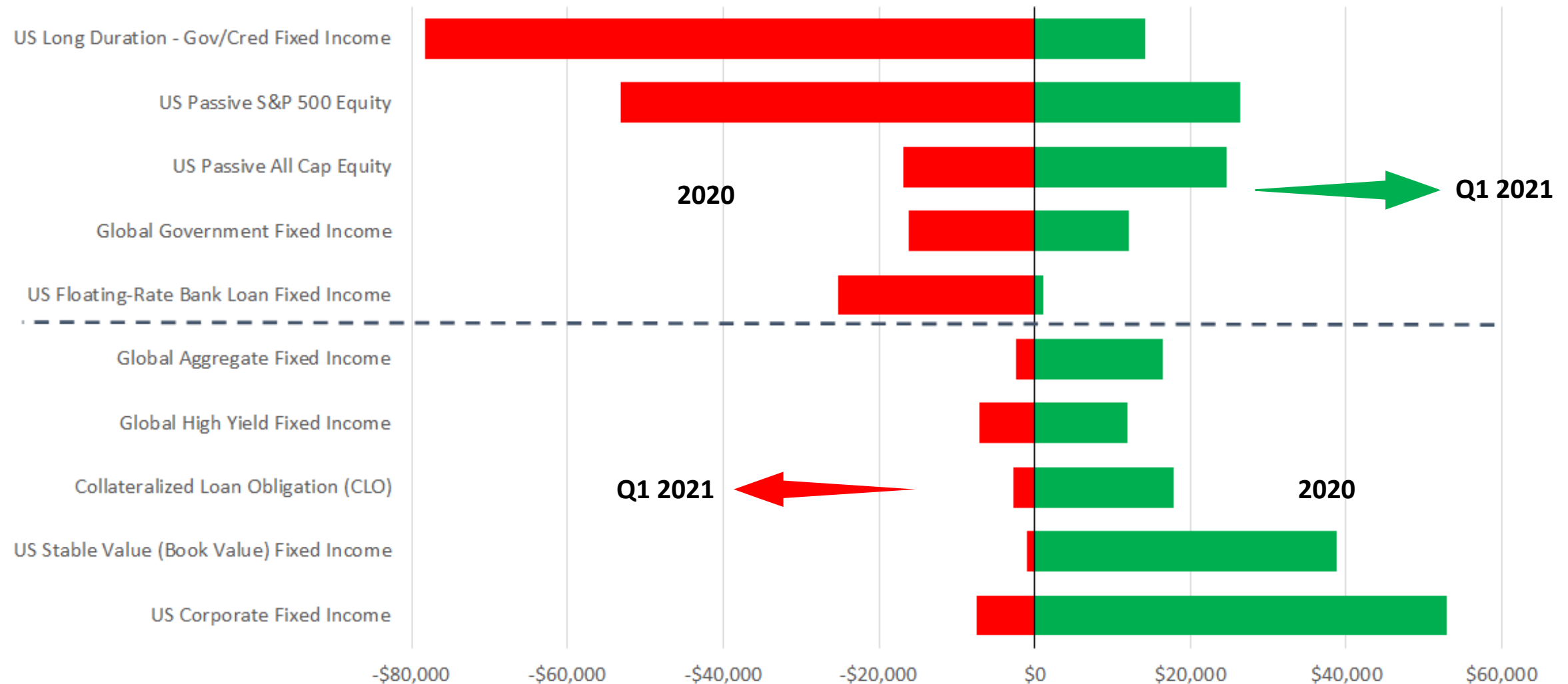
Regional Flow Drivers: APAC Investors

Source: eVestment Asset Flows, Net Flows Last 4 Quarters through Q1 2021



Biggest Shifts in Net Flows

Source: eVestment Asset Flows, Q1 2021 vs. Full Year 2020



Trends in Investor Viewership

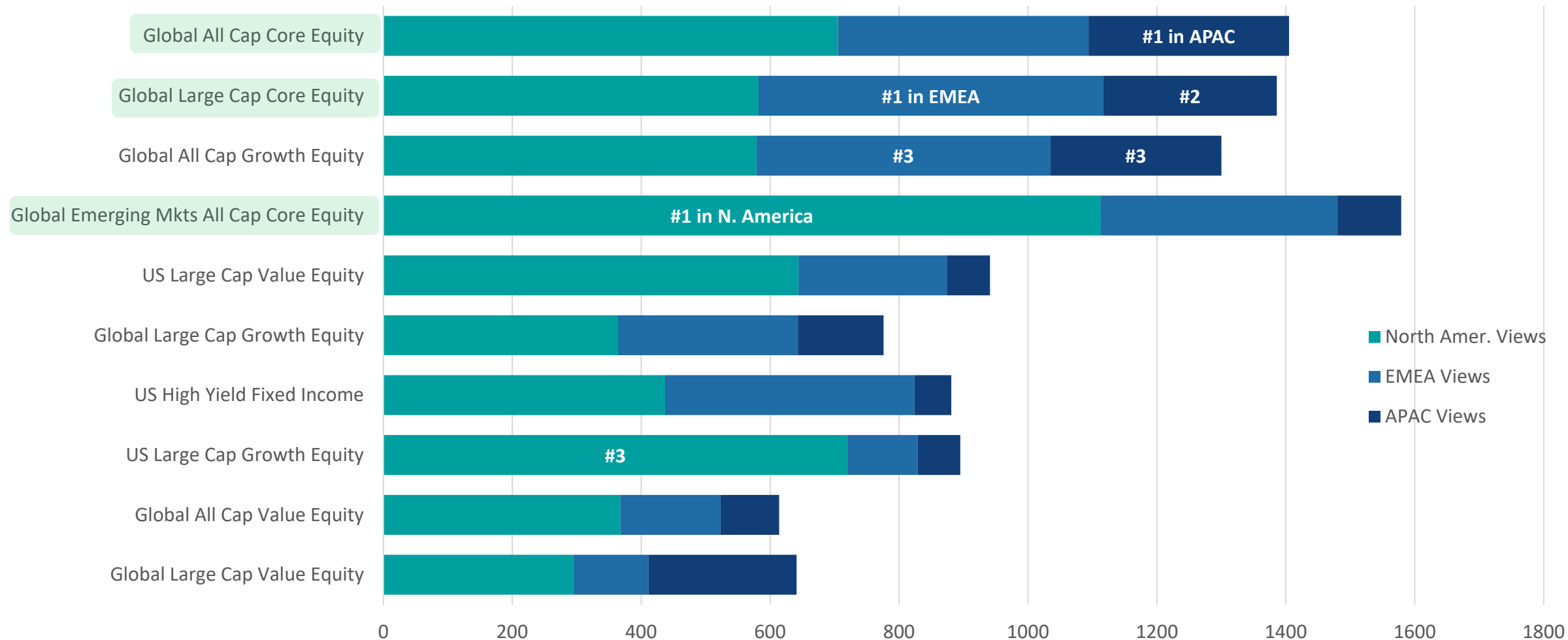
Concentrations of Investor Interest by Region in 2021

Source: eVestment Advantage. Proportion of total product views within each investor domicile garnered by major roll-up universes.

Global Equity	Global Fixed Income	US Equity	US Fixed Income	EM Equity	EM Fixed Income	APAC Equity	APAC Fixed Income	Europe Equity	Europe Fixed Income	Canada Equity	Canada Fixed Income	Int'l Equity	Multi-Asset	Public Real Assets
U.S. 36.97%	Europe ex-U.K. 28.50%	U.S. 79.44%	U.S. 77.06%	U.S. 47.43%	Europe ex-U.K. 54.14%	Europe ex-U.K. 25.87%	Asia ex-Japan 36.98%	Europe ex-U.K. 38.54%	Europe ex-U.K. 62.99%	Canada 97.75%	Canada 96.01%	U.S. 83.89%	U.S. 44.24%	Middle East/Africa 28.90%
Canada 16.46%	U.S. 25.70%	Europe ex-U.K. 7.43%	Middle East/Africa 10.52%	Canada 26.36%	Middle East/Africa 18.35%	Middle East/Africa 25.44%	Middle East/Africa 21.35%	Middle East/Africa 27.99%	Japan 21.65%	Middle East/Africa 1.19%	U.S. 3.37%	Canada 11.34%	Asia ex-Japan 26.68%	U.S. 28.90%
Europe ex-U.K. 12.73%	Middle East/Africa 11.87%	Middle East/Africa 4.54%	Europe ex-U.K. 4.75%	Middle East/Africa 9.75%	U.S. 15.43%	U.S. 19.62%	Europe ex-U.K. 16.15%	U.S. 14.20%	Asia ex-Japan 11.02%	U.S. 0.66%	Europe ex-U.K. 0.31%	Europe ex-U.K. 1.70%	Middle East/Africa 10.19%	Canada 27.87%
Middle East/Africa 11.23%	Canada 10.61%	Asia ex-Japan 3.34%	Asia ex-Japan 2.99%	Europe ex-U.K. 8.49%	Asia ex-Japan 6.57%	Australia/NZ 9.50%	Japan 14.06%	Asia ex-Japan 7.71%	U.K. 1.57%	Asia ex-Japan 0.27%		Middle East/Africa 1.23%	Canada 10.05%	Europe ex-U.K. 4.65%
Asia ex-Japan 10.71%	Japan 7.04%	Canada 3.14%	Japan 1.79%	Asia ex-Japan 3.35%	Canada 2.29%	Japan 6.98%	Australia/NZ 5.21%	Japan 5.48%	Australia/NZ 1.18%	Asia ex-Japan 1.08%		Europe ex-U.K. 2.41%	Australia/NZ 3.10%	
Australia/NZ 3.97%	U.K. 6.68%	Japan 0.71%	Canada 1.71%	Australia/NZ 2.31%	Australia/NZ 1.85%	Canada 5.57%	U.K. 3.65%	U.K. 2.84%	Middle East/Africa 1.18%	Australia/NZ 0.09%		Japan 1.88%	Asia ex-Japan 2.84%	
U.K. 3.69%	Asia ex-Japan 5.07%	Australia/NZ 0.26%	Australia/NZ 0.44%	U.K. 1.96%	Japan 0.63%	U.K. 3.05%	U.S. 1.56%	Canada 2.03%	U.S. 0.39%	Japan 0.06%		Australia/NZ 1.61%	Japan 1.68%	
Japan 3.50%	Australia/NZ 4.17%	U.K. 0.19%	U.K. 0.16%	Japan 0.30%	U.K. 0.58%	Asia ex-Japan 2.96%	Canada 0.52%			U.K. 0.06%		U.K. 1.61%	U.K. 1.42%	
21.30%	4.31%	23.51%	9.88%	11.79%	5.27%	5.30%	0.49%	1.27%	0.65%	1.94%	0.84%	8.78%	1.92%	1.99%

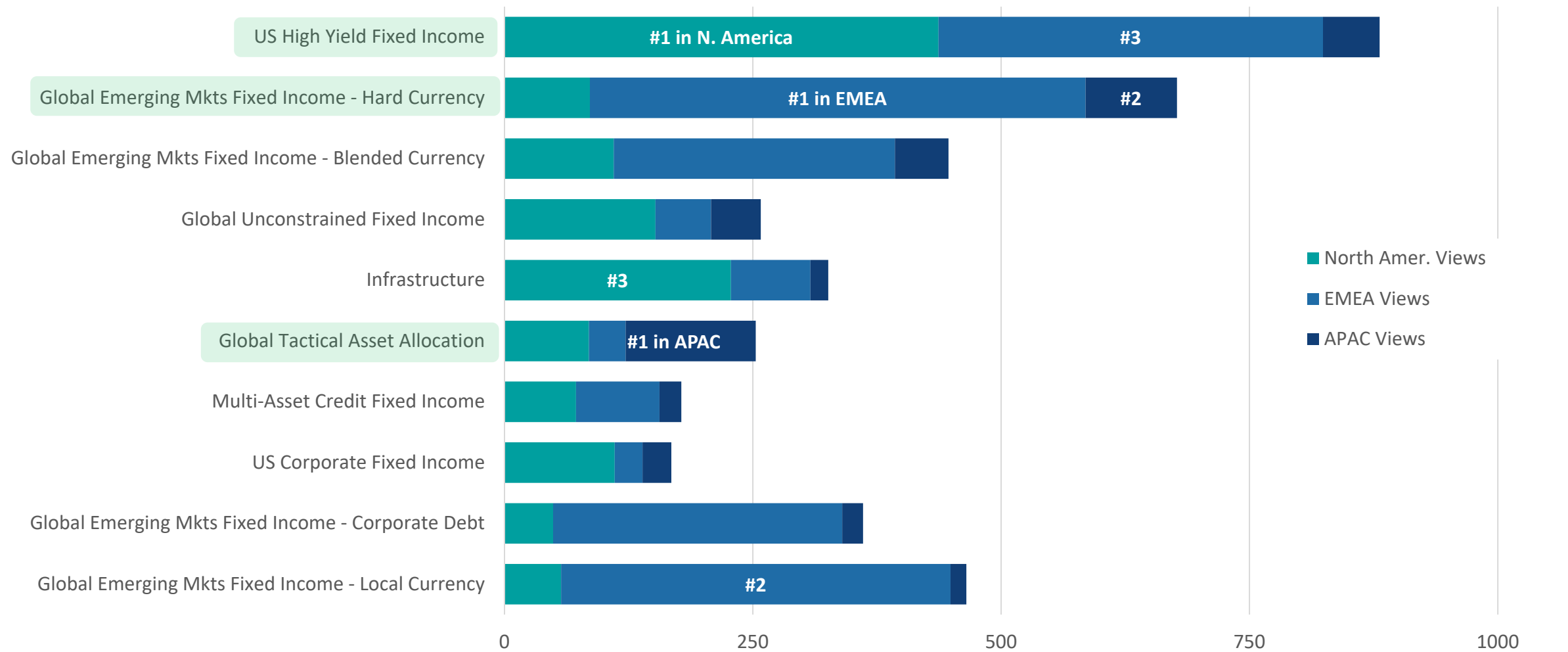
Broadly Viewed Strategies by Global Investors in 2021

Source: eVestment Advantage



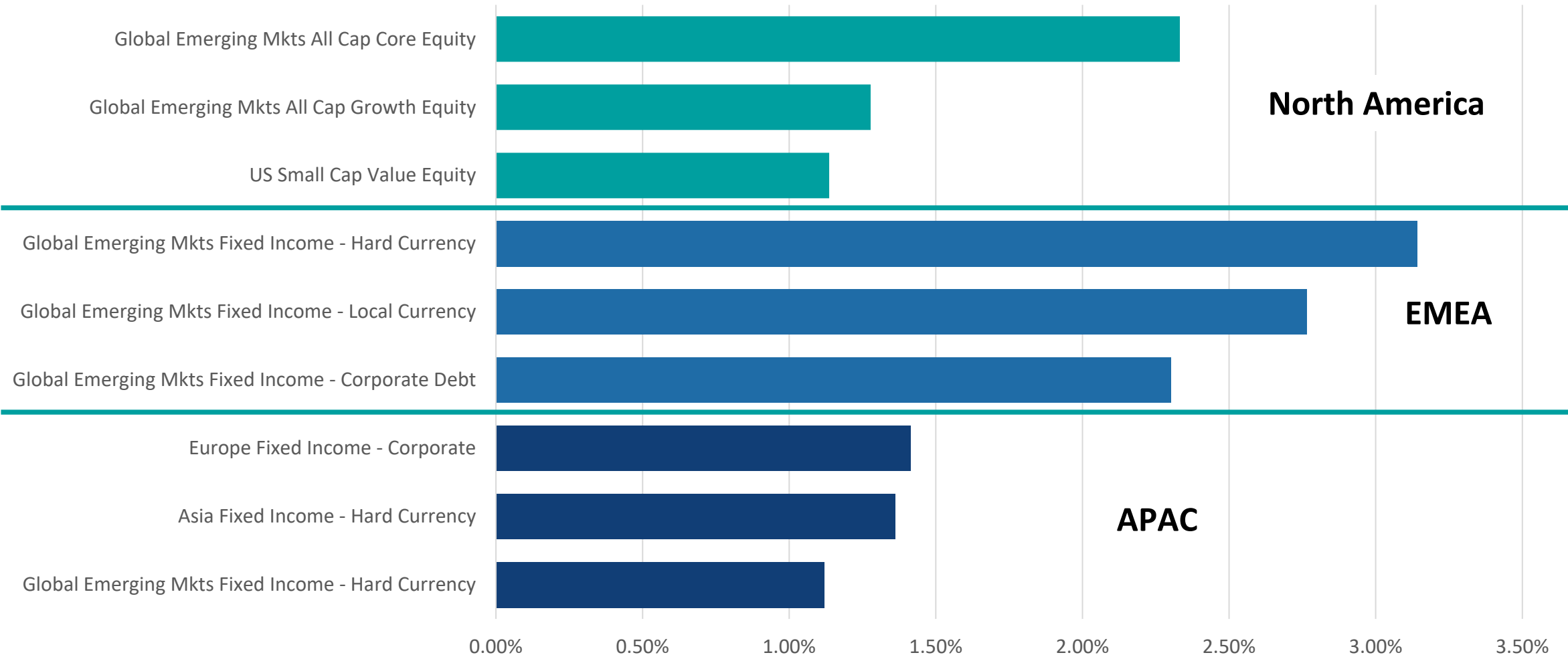
Broadly Viewed Non-Equity Strategies by Global Investors in 2021

Source: eVestment Advantage



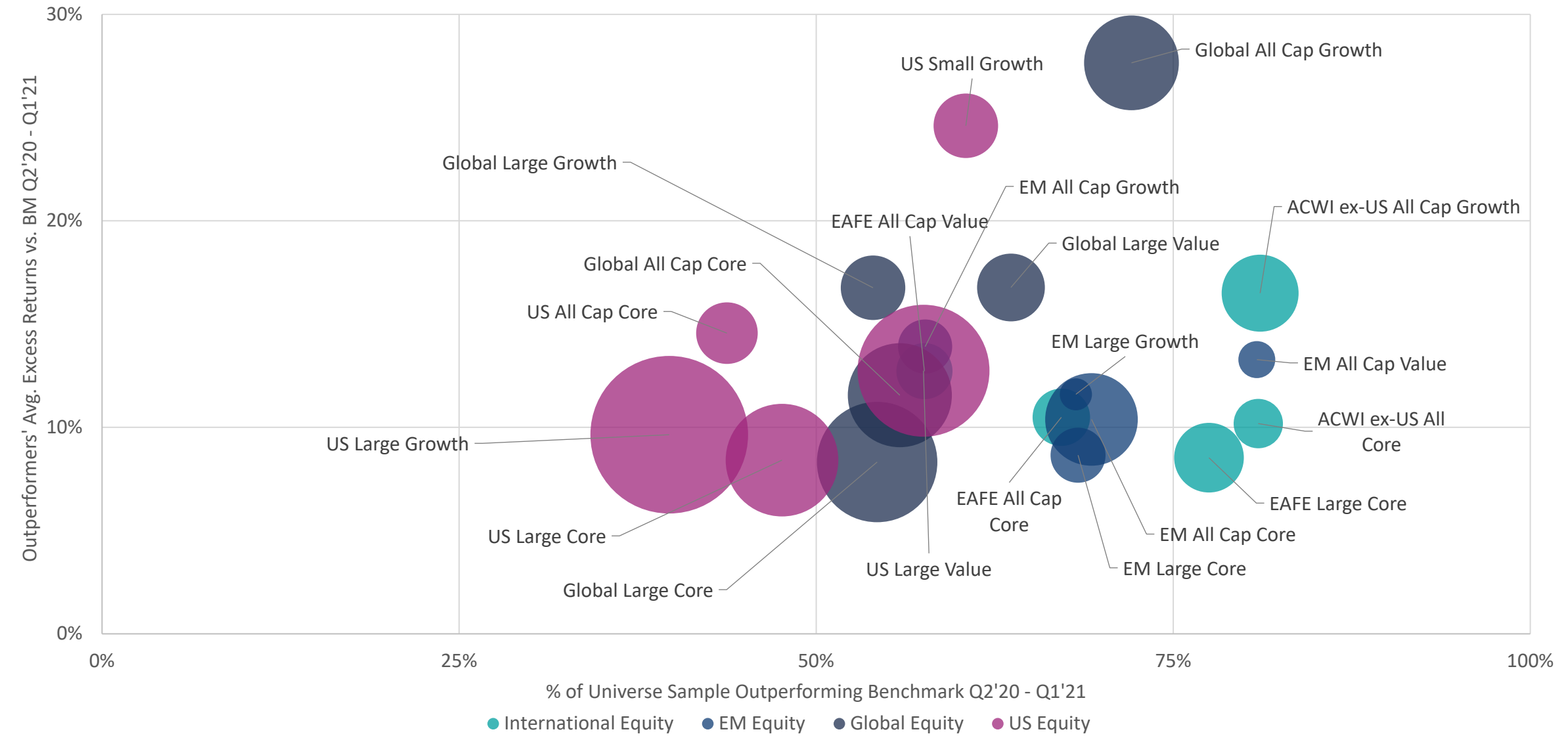
Where Investor Interest Has Increased Significantly in 2021

Source: eVestment Advantage



Performance Relative to Benchmarks

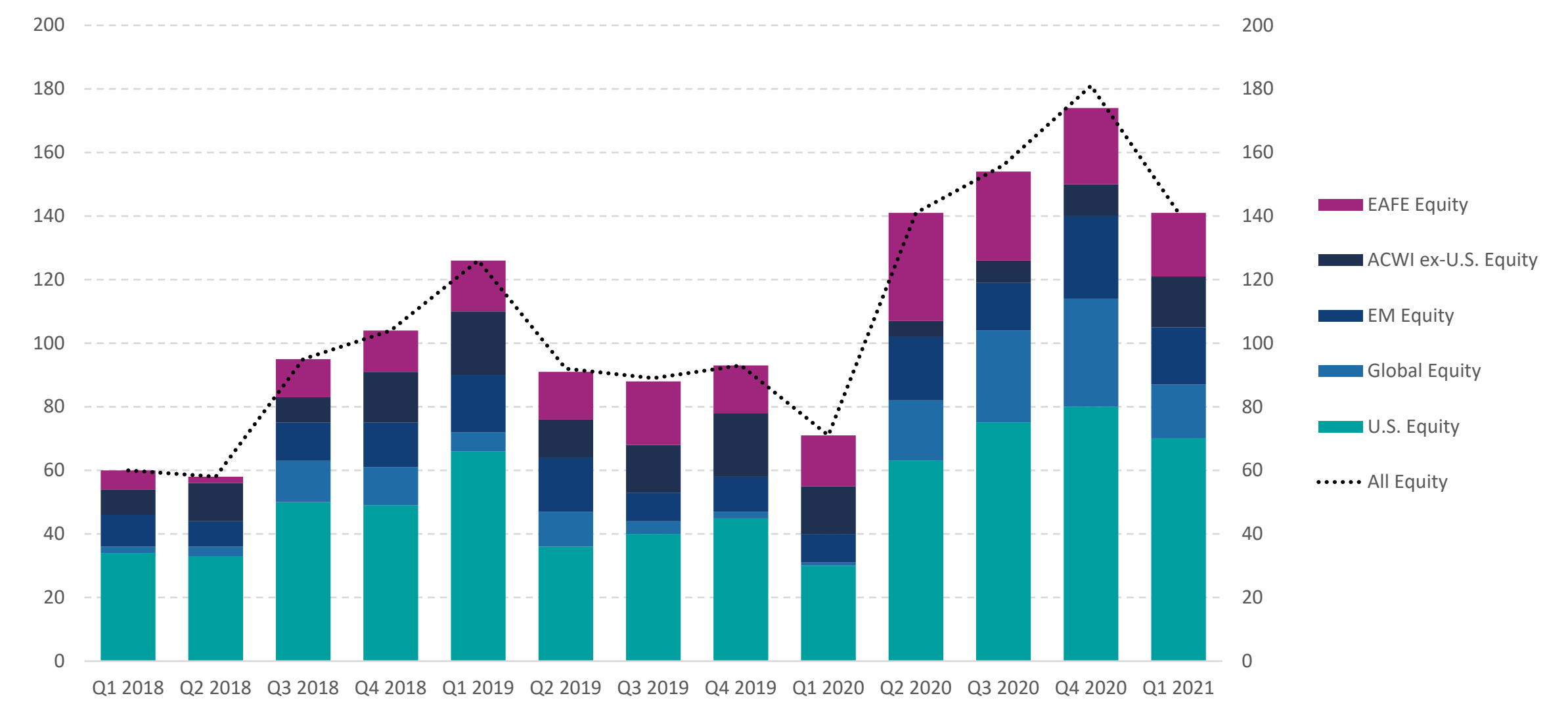
Source: eVestment Analytics



Global Opportunities & Risks

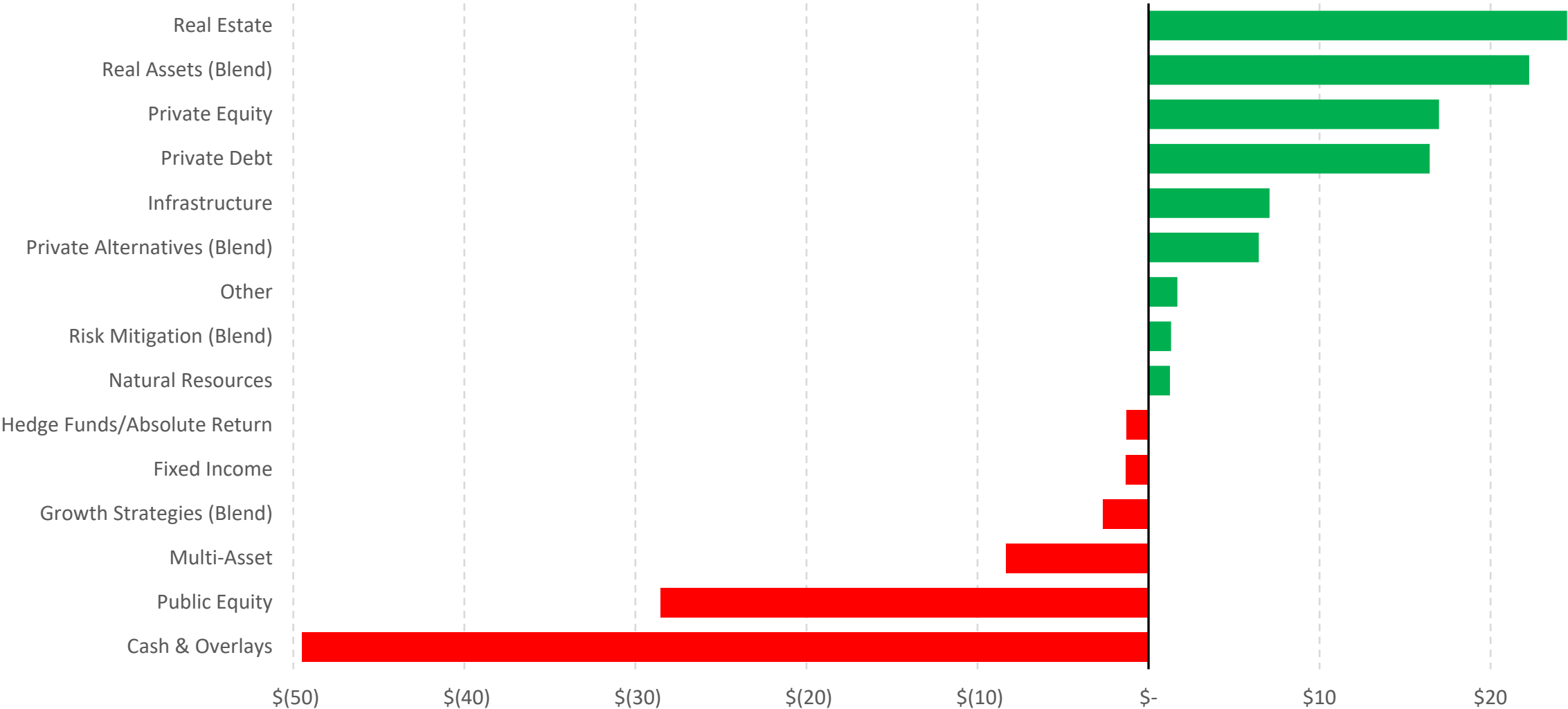
Number of Watchlist Managers Has Ebbed From COVID High

Source: eVestment Market Lens



Asset Allocation Trends: Implied Net Flow

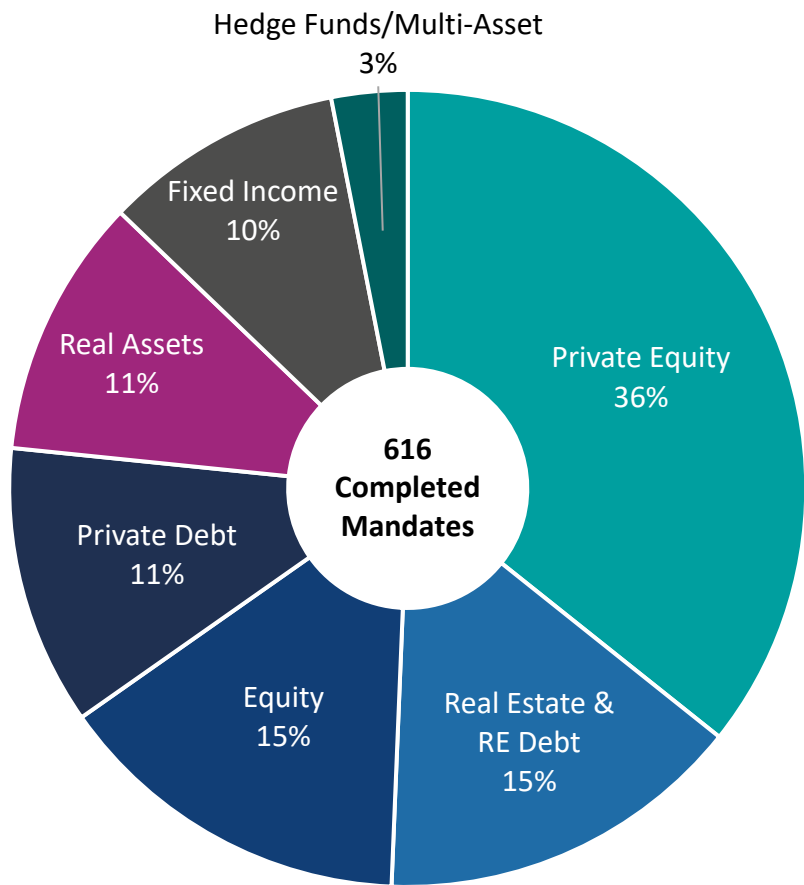
Source: eVestment Market Lens, based on 249 U.S. public plans managing \$4.1T through 4Q'20



Completed and Ongoing Opportunities

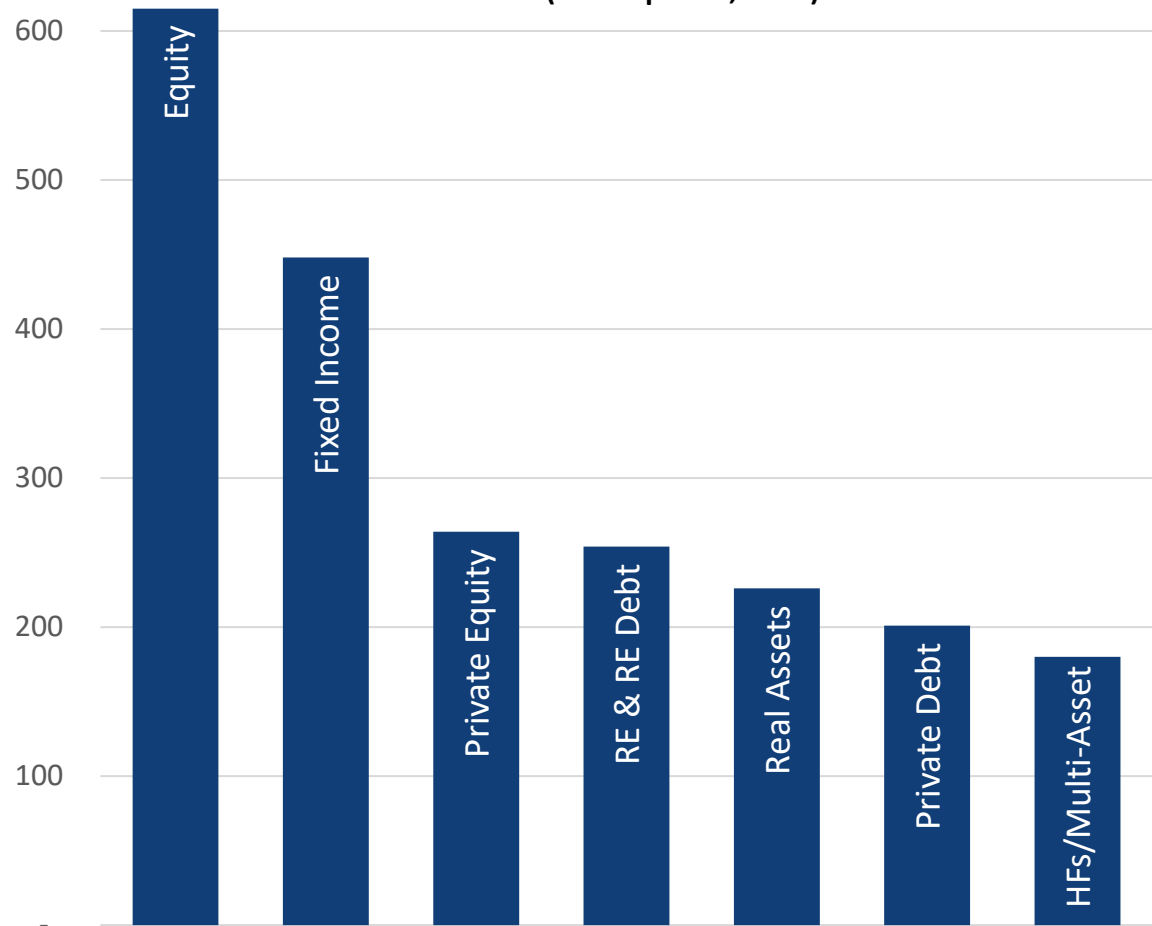
Source: eVestment Market Lens

Completed Mandates in Q1 2021



Open & Potential Mandates

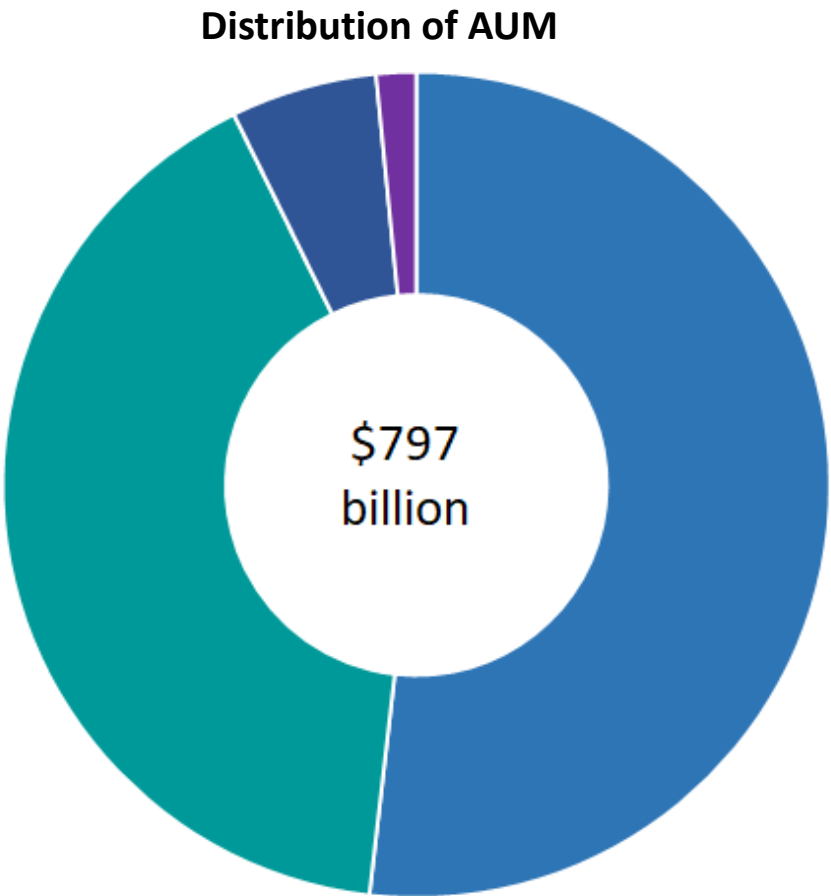
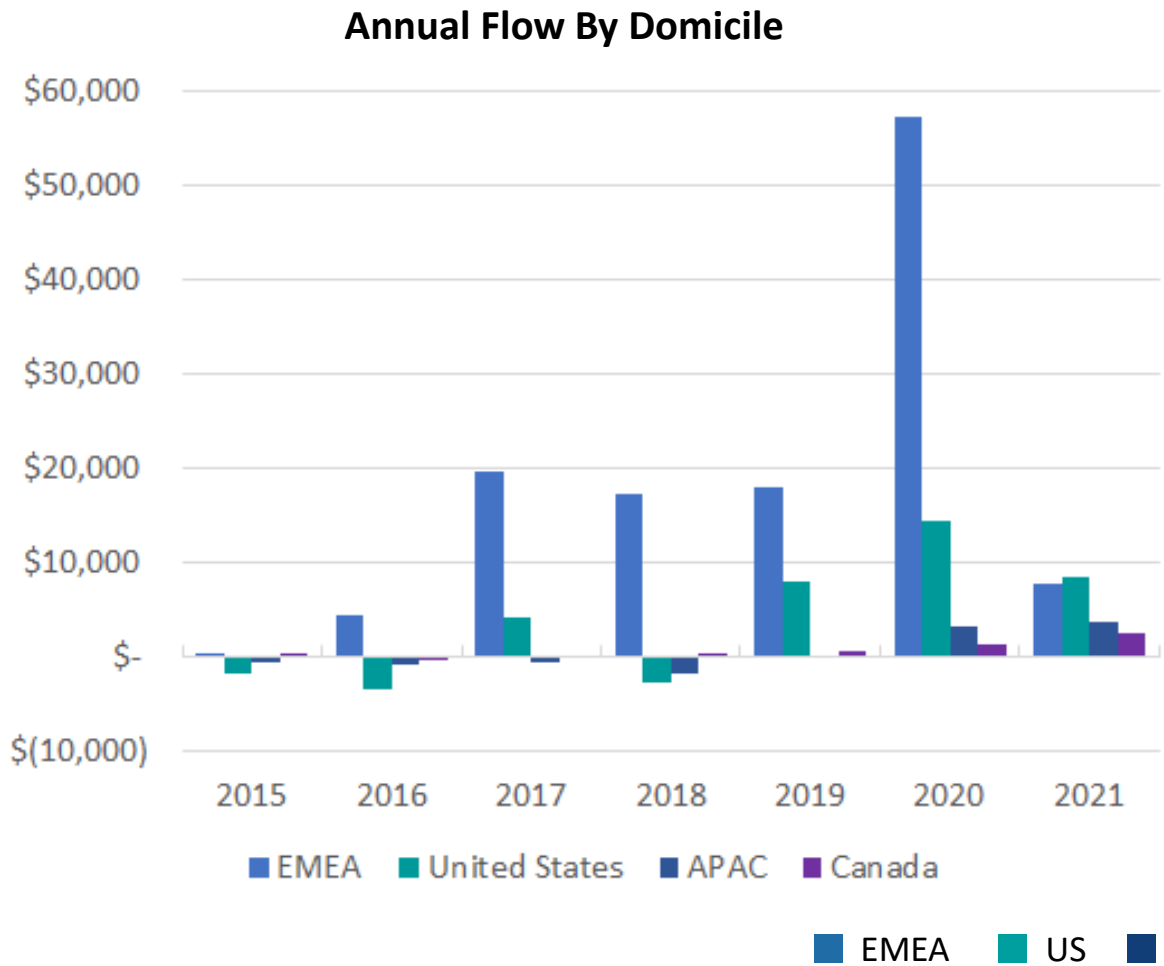
(as of April 25, 2021)



A Closer Look: ESG-Focused Strategies

The ESG-Focused Universe Through Q1 2021

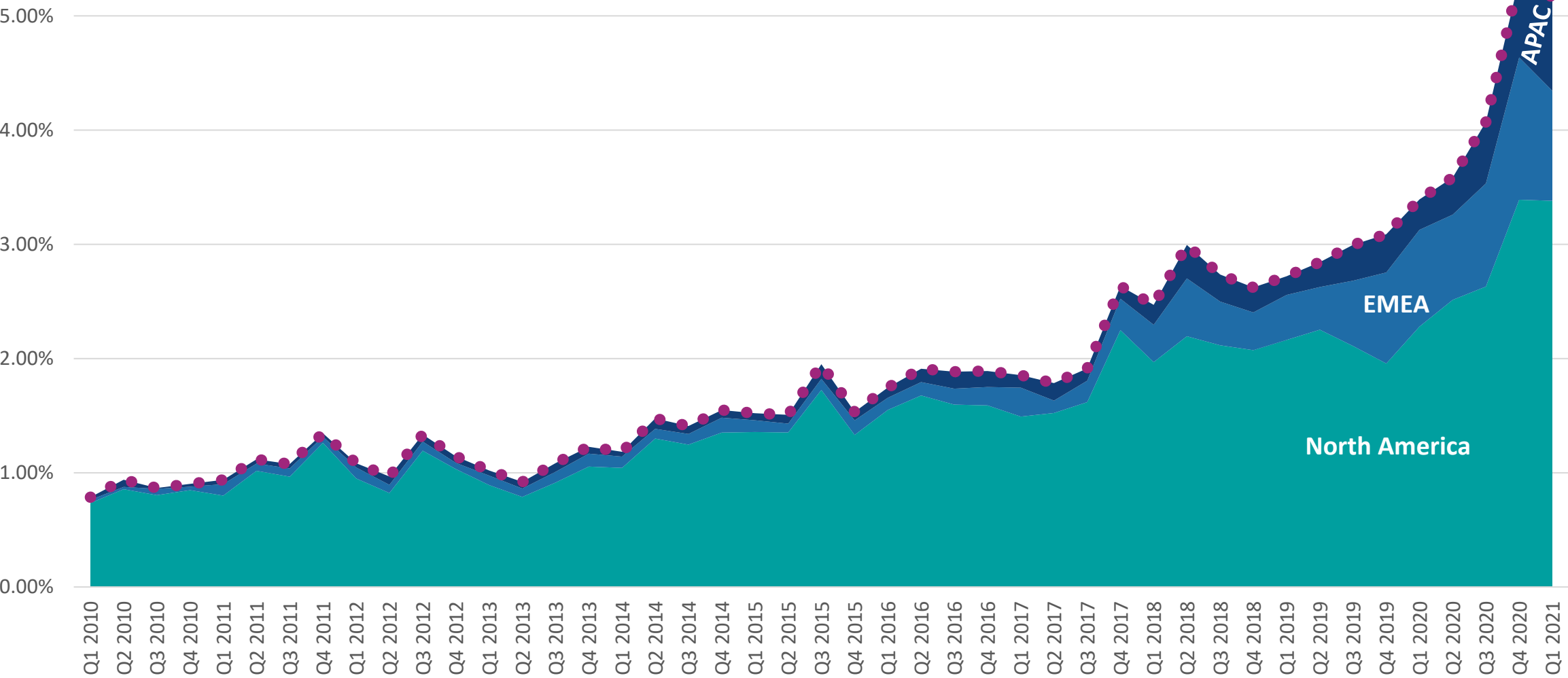
Source: eVestment Asset Flows



ESG-Focused Viewership Rapidly Increasing

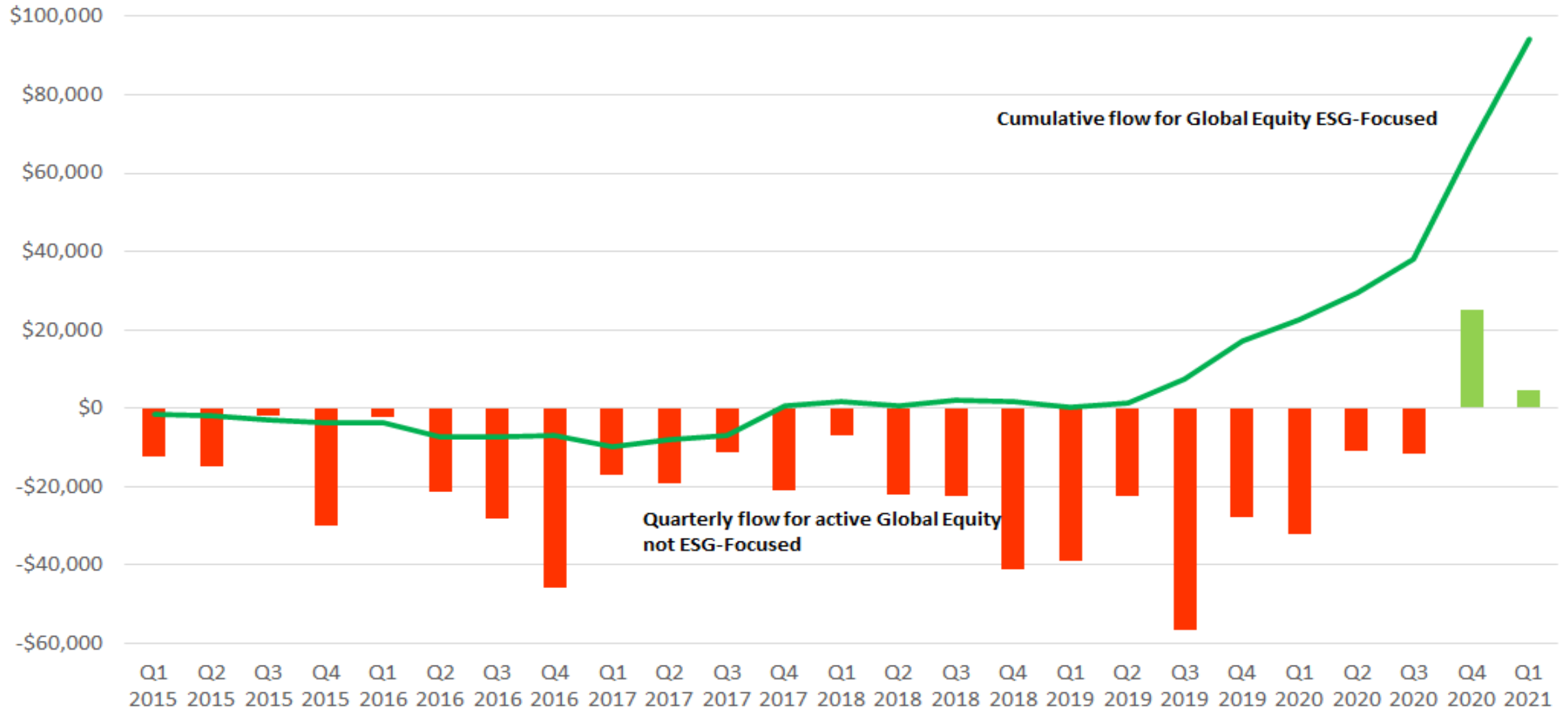
Source: eVestment Advantage

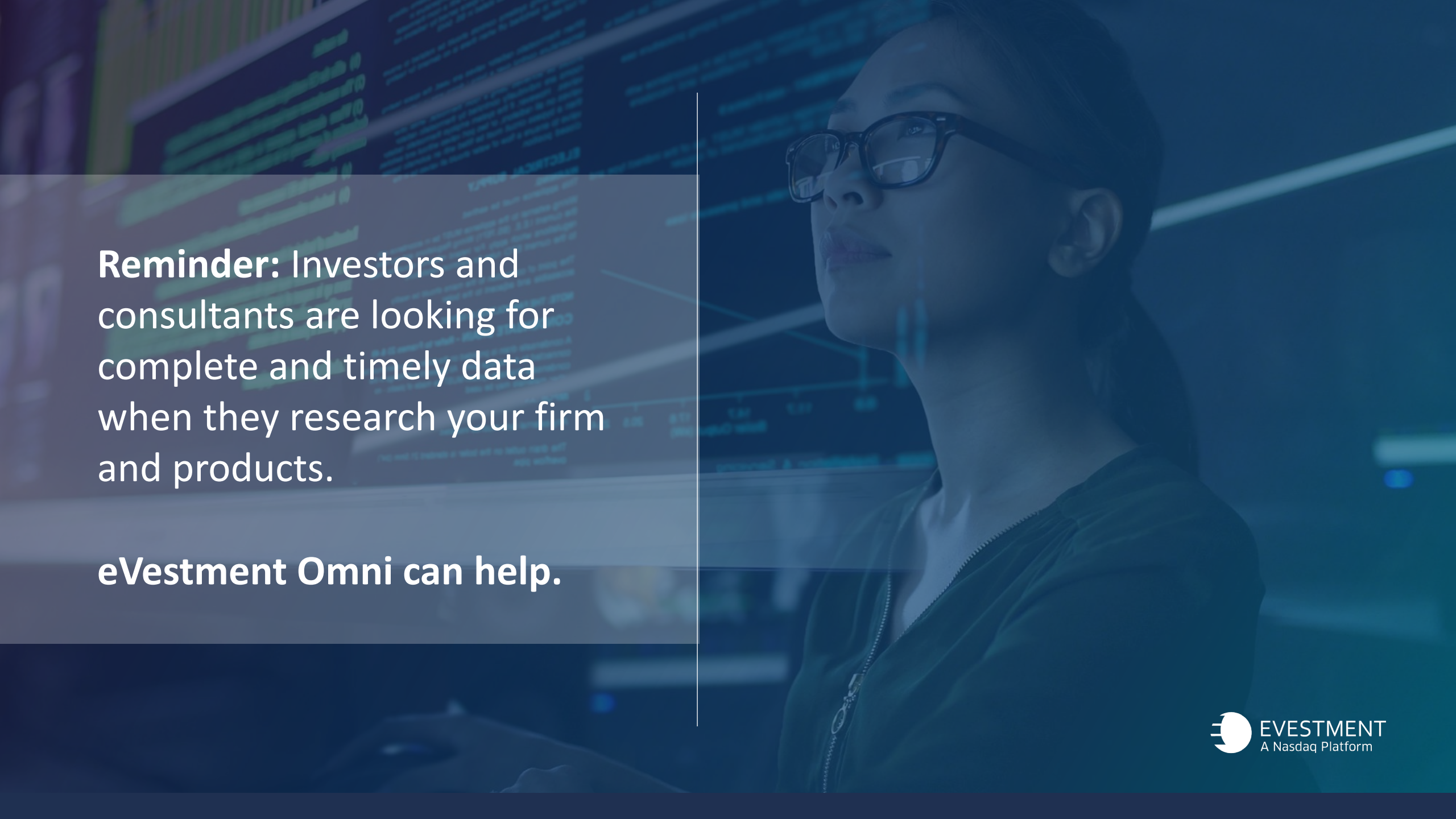
% of all traditional product views captured by All ESG-Focused strategies



ESG Attracting Assets, Global Equity Flow Shifts

Source: eVestment Asset Flows



A woman with dark hair and glasses is shown in profile, looking upwards and to the left. She is wearing a dark jacket. The background is a blurred image of a computer screen displaying various financial data, including line graphs and tables of numbers. The overall color scheme is dark blue and teal.

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