



a wealth of

# choice

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Mercer  
Investment  
Solutions

welcome to brighter

Today's institutional investors are looking to trusted advisors to provide solutions to help them meet their goals in an increasingly complex market environment. But although every investor must find a way to navigate uncertainty and capture market opportunities across all asset classes in all market conditions, no one is looking for a one-size-fits-all solution. At Mercer, we let you decide how you want to work with us, and we work to make the process simple, clear and transparent. We sift through the noise and provide a clear path forward — always in your best interest.

### Evolving with your objectives in mind

You can choose just the solutions you need from our world-class investment solutions platform to keep your investment objectives in focus and evolve your options as your needs change.

Outsourced CIO (OCIO)	DC delegated solution: Mercer Future Wise™	Private markets	Hedge fund strategies
Benefit from an experienced robust risk management, sophisticated and timely investment management, and potential cost savings through a comprehensive, delegated solution.	A delegated defined contribution solution that provides you with a full suite of services — from portfolio management to plan design and fee negotiation — leaving control of strategic decisions in your hands. With Mercer managing your day-to-day plan governance, you are free to focus on broader plan strategies.	Explore approaches aimed at diversifying public market risk, boosting returns and protecting against inflation with access to private equity, including secondaries and co-investments, private debt, real estate, infrastructure and other real assets.	Potentially diversify out of public market risks, and capture nontraditional return sources and alpha opportunities through access to a prudently constructed portfolio of hedge fund strategies.
Traditional asset portfolios	ESG and impact	Diversity, equity and inclusion	Multinational corporate solutions
Gain exposures to global opportunities and risks through daily liquid, fixed income, equity and real assets portfolios. A multi-manager approach provides access to strategic portfolio design, nimble decision-making and execution.	Take steps to reduce risk, and benefit from the transition toward a renewable and more equitable economy by integrating ESG themes into your portfolio.	Pursue a broader universe of investment return opportunities by expanding diversity of thought and experience, and align with your organizational philosophy, incorporating considerations related to race, ethnicity and gender.	Seek better control, outcomes and transparency through a global governance framework, universal reporting and aggregated purchasing power combined with local investment and regulatory expertise.

As an early entrant to OCIO, our platform offers strategic allocation advice, dynamic asset allocation positioning, and manager selection and implementation. We can assume discretion to adjust market exposure relative to long-term targets when we expect emerging opportunities or mounting threats — always within your risk tolerance.

### Extensive insights and resources

As the number-one globally ranked OCIO provider,<sup>1</sup> Mercer uses an approach that’s differentiated in two significant areas:

- **Investment connectivity** — Our globally coordinated, forward-looking strategic capabilities and extensive manager relationships provide the linkages to identify critical trends. These insights are backed by intellectual capital developed by a team of more than 200 investment professionals across various markets.<sup>2</sup> Rely on our OCIO team to monitor important risks and opportunities, helping your portfolio evolve with the market. We use our experience and resources to manage your portfolio to mitigate downside risk, avoid unnecessary complexity and implement our shared best ideas — all in order to deliver strong performance.
- **Platform confidence** — Over Mercer’s 25-year history in the OCIO market and an average firm tenure of 15 years among our senior Investment Solutions leaders,<sup>3</sup> we have intentionally invested in our platform to deliver clear solutions and peace of mind. Our 50+ dedicated portfolio management specialists have visibility into daily portfolio insights and nimble trading capabilities around cash flow management, rebalancing and portfolio monitoring. Our Canada Law & Tax Practice Group keeps clients apprised of looming legal or regulatory changes, and our strategists and decision makers give you timely, transparent analytics and portfolio information. Through an investment solutions relationship, you can access Mercer’s vast economies of scale, benefiting from potentially greater investment diversification and lower negotiated investment fees.

### Mercer can help you:

Focus on the things that matter most	Build confidence in your strategic decisions	Pursue success together
<ul style="list-style-type: none"> <li>• Outcome-oriented solutions</li> <li>• Holistic perspective</li> <li>• Specialty expertise</li> </ul>	<ul style="list-style-type: none"> <li>• Experience in your industry</li> <li>• Global research and ideas</li> <li>• Broad and deep resources</li> </ul>	<ul style="list-style-type: none"> <li>• A heritage of delivering “on-your-side advice”</li> <li>• Customized solutions</li> <li>• Trusted advice</li> </ul>

<sup>1</sup> [Pensions & Investments website](#). As of March 31, 2021, Mercer had worldwide institutional assets of US\$260.5 billion under fully or partially discretionary management.

<sup>2</sup> As of March 31, 2021.

<sup>3</sup> Tenure with Mercer includes individuals’ tenure at firms subsequently acquired by Mercer.

### A range of investment solutions for:

- Defined benefit plans
- Defined contribution plans
- Endowments
- Foundations
- Healthcare organizations
- Insurers
- Wealth management firms

### For more information

[Contact your Mercer consultant](#) to learn how Mercer’s scale, knowledgeable investment professionals, broad range of global investment solutions and OCIO capabilities can deliver improved governance and better investment outcomes for your program.

# Reshaping the future.

## About Mercer

At Mercer, we believe in building brighter futures.

Together, we're redefining the world of work, reshaping retirement and investment outcomes, and unlocking real health and wellbeing. We do this by meeting the needs of today and tomorrow. By understanding the data and applying it with a human touch. And by turning ideas into action to spark positive change.

For 75 years, we've been providing trusted advice and solutions to build healthier and more sustainable futures for our clients, colleagues and communities.

Welcome to a world where empathy and economics make a difference in people's lives.

Welcome to brighter.

For further information, please visit [www.mercer.ca](http://www.mercer.ca)

Join the conversation

[Twitter @MercerCanada](https://twitter.com/MercerCanada)

[LinkedIn Mercer Canada](https://www.linkedin.com/company/mercer-canada)

## How we can help

Continuously rethinking purpose and priorities drives HR transformation. Shaping the future of work requires improved strategies around investment and retirement, health and wellness benefits, talent and communications. We believe in the value of investing in the future to build resilience for your business and your employees.

Investments and retirement require sophisticated solutions. We approach these with a big-picture view that prioritizes long-term financial wellness. We offer research and advice on assessing risk and designing benefits programs while keeping in mind the need to optimize throughout changing times.

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