

Performance and risk reporting service:

Helping you understand investment performance

In an increasingly complex financial environment, understanding how your investments are performing is essential. Our performance report provides you with in-depth analysis and quantitative insights to better understand your investment strategy's outcomes. This gives you the clarity to make informed decisions with confidence and concentrate on what matters most to your organisation and stakeholders.

Key highlights of our performance report

- ▶ **Comprehensive reporting:** Detailed analysis of performance and attribution across asset classes, investment managers, regions and portfolios, giving you a complete view of how your investments are performing.
- ▶ **Long-term perspective:** Performance and historical risk reporting over a range of time periods, helping you assess progress against your long-term objectives.
- ▶ **Performance analysis:** Using monthly data and recognised methodologies, we identify the key factors influencing portfolio returns.
- ▶ **Benchmark comparisons:** Compare performance against market indices and bespoke benchmarks to understand results in context.
- ▶ **Data quality and oversight:** We work directly with your investment managers to collect, validate and reconcile data, helping ensure your reports are accurate and delivered on time.
- ▶ **Flexible reporting:** Analysis and reporting tailored to your governance structure, investment arrangements and reporting requirements.
- ▶ **Market context:** Quarterly market commentary and insights help explain performance outcomes and broader market developments.

Tailored onboarding and deadline-driven reporting

We keep the onboarding process simple and shaped around your needs. Our team works directly with your investment managers to gather the information we need and configure your reporting smoothly.

We maintain regular communication to keep data flowing accurately and address any issues early on. You'll receive analysis in a format, depth and frequency that works for your governance structure – whether that's supporting trustee meetings, board discussions or private reviews.

We plan ahead with you to agree timelines, capture any changes to your investments or benchmarks and make any design updates you need. Our aim is to provide a clear, reliable service that fits naturally into your decision-making cycle.

Why this report matters

- ▶ **Monitor portfolio performance:** Track performance over time and compare results with agreed benchmarks. This helps you understand how your investments are performing and whether they remain aligned with your objectives.
- ▶ **Support informed decision-making:** Clear performance analysis helps you understand which asset classes, managers or investment decisions are contributing to overall results, supporting discussions around asset allocation, manager selection and portfolio changes.
- ▶ **Provide an independent view:** Objective reporting helps support governance discussions by presenting performance information clearly and consistently.
- ▶ **Meet reporting requirements:** Access the data and analysis needed to support reporting obligations and demonstrate transparency in the management of assets.
- ▶ **Support governance and long-term goals:** Understand whether your investments are progressing as expected, identify areas that may require attention and make well-informed decisions that support long-term objectives
- ▶ **Identify trends and patterns:** Spot emerging trends and performance patterns that can support investment discussions and future decision-making.

Our objective and reliable performance analysis report provides clients with the insights needed to understand performance clearly and support effective investment decision-making. You'll be supported by an experienced team that's committed to solving problems for clients and demonstrates best practice when it comes to performance measurement.

Contact us

If you'd like to discuss the service in more detail, please contact one of the specialists (details below) or the wider team at performancereporting@hymans.co.uk.



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