

IMAP  
Managed  
Account  
Awards –  
All your  
questions  
answered





**IMAP MANAGED  
ACCOUNT AWARDS 2020**


**SUBMISSIONS CLOSE 26 JUNE**

**AWARDS COCKTAIL EVENING 27 AUGUST**

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# IMAP Awards Assessment – Judging Criteria key points

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# IMAP Awards Judging Criteria

- Overview
- Specific Factors
- Judging Process

# Judging Criteria Overview

- **Mix of Qualitative and Quantitative factors**
  - Uses proven ratings criteria (process, people, track record and fees etc)
  - Fixed weights (70% qual/30% quant); differs for Licensees (80%/20%) & Innovation (all qual)
  - Versus peer group of Award entrants
- **Client collateral and advocacy** of managed accounts recognised

# Qualitative Factors

- **General Award Categories (Asset Class & multi-sector)**
  - Philosophy and risk return objectives
  - Quality of investment process including SAA and TAA
  - People Quality - investment team & IC and governance
  - Client Collateral / Engagement / supporting materials
- **Innovation Category**
  - 'Genuine' innovation such as technology
  - Test with licensees, custodians, platforms and others

# Quantitative Factors

## **Track Record (Asset Class & multi-sector)**

- Usually short track records (1-2 years)
- Compare vs benchmark and portfolio objectives

## **Fees (model manager)**

- Input by IMAP ranking via client balance categories
- Focus on latest year



# Judging Process

- **Written submissions (cut-down FSC), quantitative template and examples of client collateral**
  - Judging Panel reviews by asset class and awards category over a number of months; decision by consensus
  - FEFundInfo provides quantitative analysis
- **Finalist interviews for Licensee and Innovation Awards.**

**James Waterworth**

National iShares ETF Specialist, BlackRock Australia

June 2020

**BlackRock**<sup>®</sup>

# BlackRock Portfolio Analysis & Solutions (BPAS)

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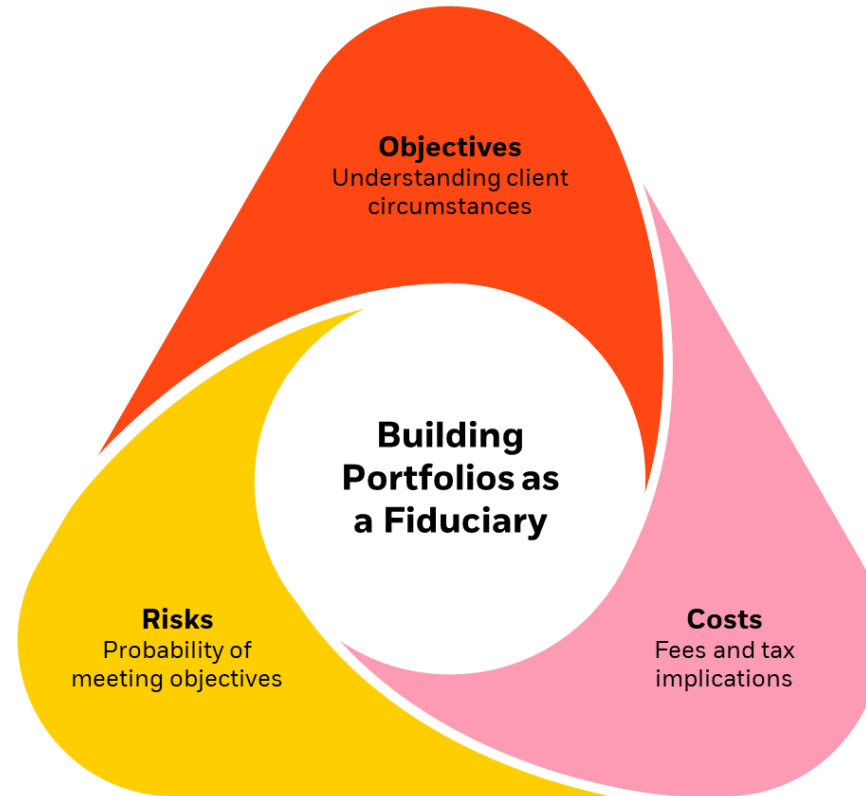
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# Portfolio Risk Lens by BlackRock

BlackRock Portfolio Analysis & Solutions (BPAS)



- Portfolio Construction**  
We can help clients target specific investment outcomes in a persistently challenging market and regulatory environment
- Risk Technology**  
Analysis leveraging the full power of the Aladdin® platform helps to truly understand client portfolios
- Market Insights**  
BlackRock's asset allocation insights translated into portfolio positioning ideas
- Product Breadth**  
We can provide a complete set of investment solutions spanning index, active, and alternatives



# How can we help you?

BlackRock Portfolio Analysis & Solutions (BPAS)

“How can I **replicate** the  
..XYZ index efficiently and  
cheaply?”

“Can you help me  
**understand** and manage  
my portfolio **risk** better?”

“What changes can I make to  
my portfolio to **enhance** the  
investment outcome?”

1 | Portfolio risk & asset allocation

2 | Index, factor, alpha: blending strategies

3 | Thematic investing (Megatrends)

4 | Factor investing

5 | Liquidity sleeves with ETFs

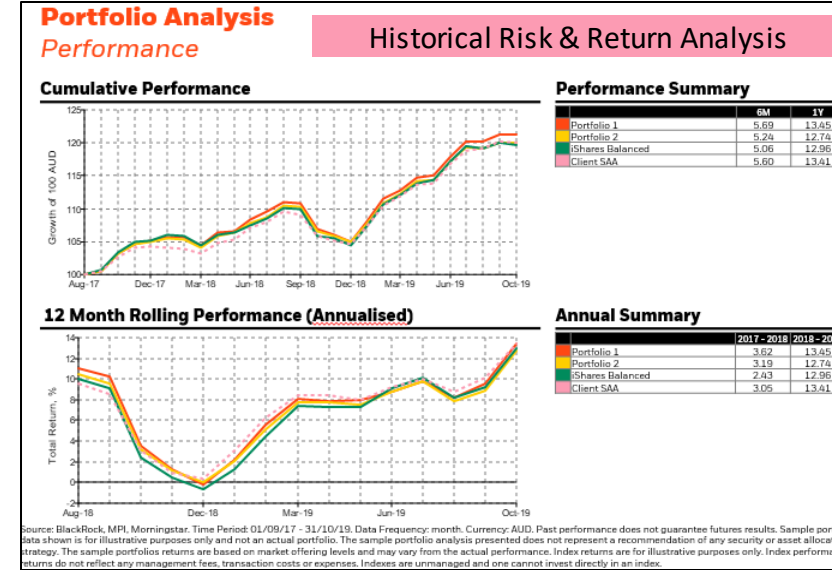
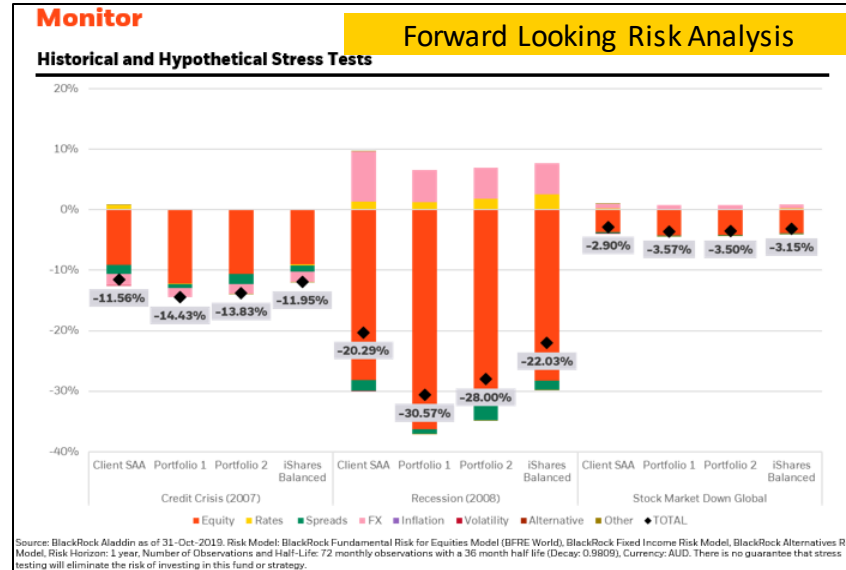
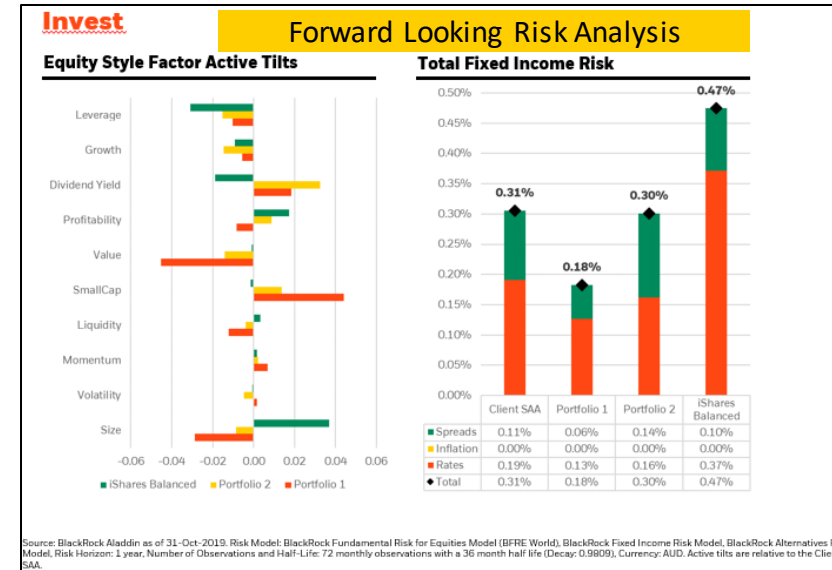
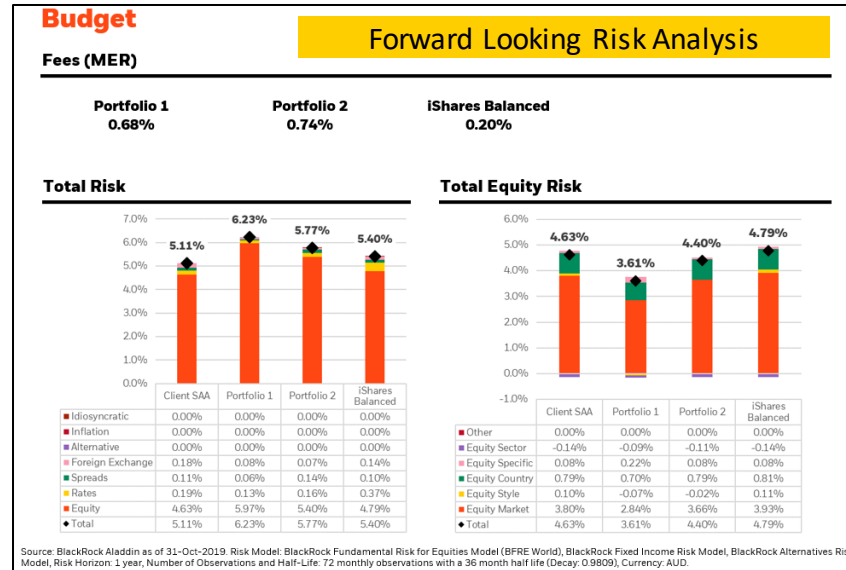
6 | Impact and ESG: building sustainable portfolios

7 | Efficient portfolio implementation with index exposures

8 | Fixed income portfolio construction with ETFs

# Tailored client reporting

## BlackRock Portfolio Analysis & Solutions (BPAS)



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