

Alpha Capital Joins with Nasdaq to Create OCIO Tools to Increase Transparency

New suite of indices provide valuable tools for institutional investors to measure outsourced Chief Investment Officers

ATLANTA, Nov. 21, 2019—Alpha Capital Management, a best-in-class OCIO search provider, announced the [Alpha Nasdaq OCIO Indices](#), a suite of tools that empower institutional investors with valuable insights for assessing Outsourced Chief Investment Officer (OCIO) services. Alpha Capital collaborated with Nasdaq in developing the product suite, which provides much-needed transparency to a traditionally opaque industry.

The indices give institutional investors and OCIO firms the ability to objectively measure their performance against peers across different risk profiles, client types and asset mixes. Alpha Capital developed the indices along with Nasdaq and leading OCIOs.

Outsourced Chief Investment Officers are third-party service providers that serve as chief investment officers for institutional investors. They assume the legal and fiduciary responsibilities of a Chief Investment officer but provide the services externally. A [report by Charles Skorina & Company](#) estimated OCIO assets under management grew to \$2.38 trillion this year.

The Alpha Nasdaq OCIO Indices provide a reliable framework for institutions to objectively measure the performance data of these providers, which has traditionally been difficult to assess. The tools are a meaningful step towards establishing an industry-wide standard for OCIO performance evaluation.

The indices are based on account-level return streams, asset allocation and metadata anonymously reported directly by OCIO firms. The Alpha Nasdaq OCIO indices compile this anonymously reported data to construct a family of indices that represent the broad OCIO market along with variations of the OCIO market to more appropriately reflect the nuances across sub-categories, such as client type and risk profile.

“For too long, outsourced CIOs were measured by a wide variety of metrics that didn’t suit every player,” says Brad Alford, of Alpha Capital Management. “The Alpha Nasdaq OCIO Indices help create a level playing field and bring some transparency and uniformity to how OCIOs are measured. This is a game changer for institutional investors looking into outsourcing CIO functions and for OCIOs.”

“Market access and transparency are two of Nasdaq’s key missions,” said Terry Wade, Senior Vice President of Business and Product Development with Nasdaq’s Global Information Services. “Our work with Alpha Capital Management brings much-needed transparency and makes the OCIO space more accessible.”

For more information, please visit www.AlphaNasdaqOCIO.com.

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