

Alpha Capital Peer Universes+

Enhance Your Fiduciary Oversight With Our Independent Monitoring Service



The peer universes platform was built to provide insights into portfolio performance and asset allocation compared against 1,200+ institutions. This clarity empowers users to make knowledgeable decisions guided by unbiased, third-party analysis. Elevate your investment strategy with confidence, backed by data from a comprehensive peer universe.



	Peer Universes	Peer Universes Plus
Peer Universes By Client Type	✓	✓
5 Distinct Risk Universes	✓	✓
Data From 1,200+ Institutions	✓	✓
Customized Reporting		✓
Personalized Presentations		✓
OCIO Industry Overview		✓

First Risk-Based Peer Universes

This platform analyzes asset allocation across 25 asset classes to categorize institutions into five distinct risk universes. This approach ensures that comparisons are made between portfolios with similar risk profiles. By emphasizing both asset allocation and risk metrics, the creation of peer universes is refined to offer a more accurate reflection of investment strategies, providing benchmarks that are genuinely indicative of comparable investment approaches, enabling enhanced strategic planning based on precise and insightful data.

Schedule A Demo

www.alphacapitalmgmt.com
info@alphacapitalmgmt.com



Invest In Insights

By Leveraging Our Services & Tools

Alpha Capital Peer Universes+ is a new white-glove offering that includes a quarterly customized detailed analysis of your portfolio performance. In addition to the provided report, the Alpha Capital team offers to virtually present annually to the investment committee to enable greater clarity into the comparison and findings.

By meticulously evaluating how a client's portfolio compares to similar entities within the same industry, it facilitates a genuine "apples-to-apples" comparison, ensuring that each analysis is most closely aligned with the client's unique circumstances and objectives.

In addition to the customized report and presentation, the Alpha Capital team will also provide a wider overview of the OCIO consulting landscape, offering valuable industry context. Peer Universes+ works to empower and simplify the lives of those with fiduciary responsibilities by arming them with the most relevant context for their holdings and the wider investment landscape.

A Detailed Approach



Customized Reporting: Receive a detailed quarterly report of how your investments are performing compared with similar industries and portfolios.



Personalized Presentation: Hear from the team at Alpha Capital annually with a detailed explanation of how your performance compares with the wider industry.



OCIO Industry Overview: Learn from the Alpha Capital team about the general trends seen across the board with OCIOs.

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