



Oxon Consulting

# INDEPENDENT GIPS VERIFICATION

WHITE PAPER



# GIPS HAS BECOME AS AN INDISPENSABLE THEME IN INSTITUTIONAL ASSET MANAGEMENT

## INDEPENDENT GIPS VERIFICATION



Most institutional investors consider performance as a critical criterion for selecting investment managers and GIPS has become as an indispensable theme in institutional asset management.

Are you fluctuated with GIPS verification issues? Ambiguous firm definition, inaccurate composite construction and incomplete information disclosure are common issues encountered by most GIPS compliant firms.



## WHY CHOOSE OXON?

1. Our founder is an Oxford Postgraduate and a CFA Charterholder with over 15+ years of practical GIPS experience gaining from global asset management firms including JF, Allianz, ING and Manulife. Complementary to that, he also held other key analytical responsibilities including Head of Performance Measurement, Attribution Analysis and Investment Risk.
2. As a professional verifier, Oxon only uses senior consultant with CFA qualification for your GIPS verification.
3. Taking a 5-step approach, we will start by giving an introductory presentation about GIPS so that your firm can learn about the GIPS standards.
4. And then, we will analyse the ability of your firm to comply and put forward an implementation plan with time schedule.



## WHY CHOOSE OXON?

5. To assist your firm building the necessary infrastructure to comply, we will offer free pre-verification consultation services covering committee formation, firm definition, calculation methodology, composite construction and review of marketing disclosures.
6. To ensure quality and effectiveness, we will provide written template for building GIPS Policy & Procedure Manual of your firm.
7. For the sake of professionalism, we will only conduct your firm-wide verification ONSITE.
8. After successful verification, we will provide post-verification briefings for your sales and marketing teams.
9. Ongoing, we will keep you updated of new GIPS requirements by regular notifications.



## IN ADDITION TO FIRM-WIDE VERIFICATION, OXON ALSO PROVIDES INDIVIDUAL COMPOSITE EXAMINATION

### INDEPENDENT GIPS VERIFICATION



In addition to firm-wide verification, Oxon also provides Individual Composite Examination services. This consists of a detailed review of the input data, component portfolio returns, and composite returns to ensure fair representation and full disclosure of its investment performance. Most of our clients prefer Individual Composite Examination solely for their core strategies. Are you fluctuated with GIPS verification issues? **KEEP CALM AND CONSULT OXON.** Taking a step-by-step approach, we will work with you all the way from the beginning to the end.

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### **About Oxon Consulting**

Oxon is a professional provider of industry solutions to financial institutions and asset management firms. We offer consulting services for the building of portfolio analytics reporting platform to asset management firms and pension plan sponsors. We also offer a number of pragmatic tools for performance and portfolio analytics reporting. Our unique ability to create quality, customized products – along with our unrivaled capacity to provide GIPS verification and investment manager selection services – makes us an indispensable partner to the investment community. Oxon has the right combination of technology and services to meet your needs.

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