



Oxon Consulting

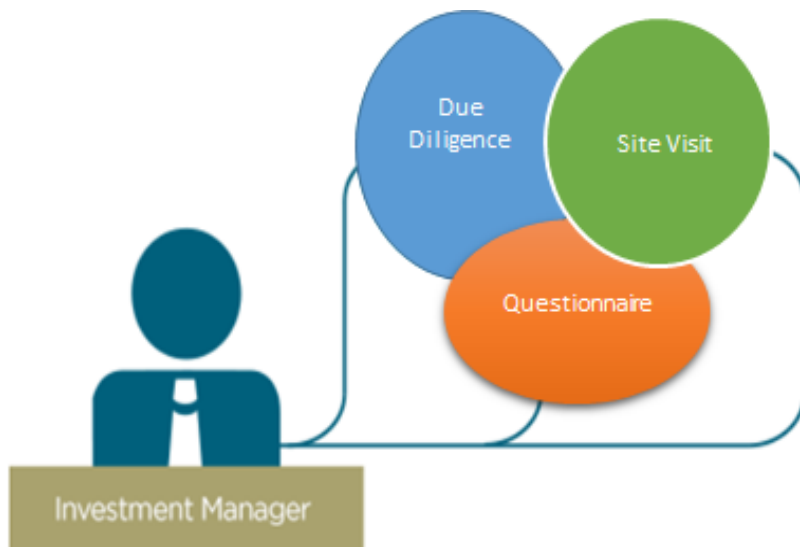
INVESTMENT MANAGER SELECTION

WHITE PAPER



INVESTMENT MANAGER SELECTION IS FATAL TO THE SUCCESS OF AN INVESTMENT BUSINESS

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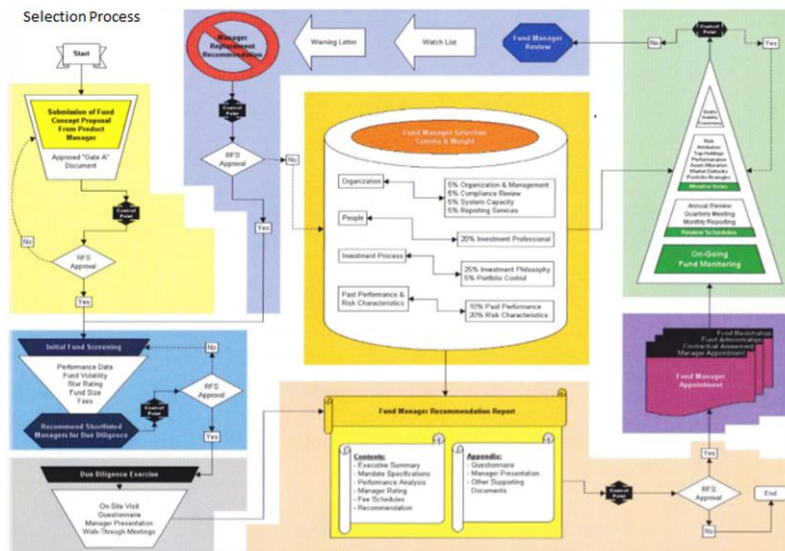


Investment manager selection is fatal to the success of an investment business. Institutional investors tend to choose top-quartile managers who have recently beaten a market benchmark. However, the paradox is that most investment managers suffered from performance slip after they were selected. The fact is that past performance has not been a good indicator of future performance.



OXON'S PROPRIETARY PROCESS GOES BEYOND THE COMMONLY ADOPTED SELECTION CRITERIA

SOPHISTICATED SELECTION PROCESS



Oxon understands this manager paradox well enough and our proprietary process goes beyond the basic selection criteria commonly adopted by the industry. We seek to identify performance attributes of the managers in both up and down markets separately. To examine the hidden risk factors of manager portfolios, we will also conduct a series of sophisticated sensitivity tests.



WHY CHOOSE OXON?

1. Oxon has extensive practical experience on performing due diligence for manager selection, ranging from boutique managers to global giant asset management firms across different asset classes.
2. Our company founder was Head of Investment Manager Selection for Manulife Financials Asia, performing due diligence for a wide range of segregated account, proprietary investment, mutual fund, unit-linked and retirement products. Previously, he has also held key analytical positions (Head of Performance, Investment Risk and GIPS) for leading asset management firms including Allianz, ING and Manulife Asset Management.



WHY CHOOSE OXON?

3. Oxon will only assign senior consultant with CFA qualification for investment manager selection exercise.
4. Every manager recommendation must go through our 7-step selection process that entails both quantitative and qualitative criteria.
5. Our due diligence includes not only portfolio analysis and questionnaire, but also manager interview and onsite visit before making any selection recommendation.
6. On a regular basis, we conduct ongoing monitoring such as performance reviews, RFI answer updates, semi-annual meetings and regular checks for possible red flags to avoid development of fatal flaws.



ARE YOU ANNOYED WITH DISAPPOINTING PERFORMANCE OF YOUR INVESTMENT MANAGERS?



Key Performance
Indicators

Are you annoyed with disappointing performance of your investment managers? **KEEP CALM AND CONSULT OXON.** Our proprietary selection process is designed to ensure that our clients have immediate access to a broad array of the most capable investment managers with appropriate risk-return attributes that can deliver consistent performance along the given investment objectives and guidelines.

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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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