

OCIOs AND VALUES-BASED INVESTING

A good OCIO can help define and execute a program that integrates values and financial goals.



ACHIEVING OUTCOMES

- The OCIO guides the board through the process of identifying which values it wishes to express in the investment portfolio.

IPS REVISION

- The OCIO can help the board determine any required adjustments to the organization's strategic asset allocation plan (including risk profile and liquidity and spending policies).

RISK-RETURN ANALYSIS

- The OCIO helps the board understand the likely implications of the methods the board is considering by modeling potential portfolio return scenarios under various market conditions.
- An OCIO with a comprehensive portfolio view can employ risk mitigation, completion, and overlay strategies to help address any skew that may occur from values-based investment initiatives.