AIMA Global Investor Forum 2023

Key Takeaways

1. Alternatives are in favour with institutional allocators who are increasingly embracing a total portfolio approach to their investments

balancing private market and public exposures across internally and externally managed mandates. With the denominator effect still impacting allocations, liquidity and leverage management at the total plan level are top of mind.

2.

The higher rate environment has provoked pockets of dislocation

across public and private markets, and while investors question how this has impacted everything from valuations to hurdles to benchmarks, they are also seeking to capitalize on the strategic opportunities that have emerged in different capital structures, technologies and corners of the globe amid a volatile geopolitical environment.

3. Culture, innovation and succession planning are critically important

as founders seek to build on the foundations of their franchises - talent, alpha generation and strategic partnership – while creating space for next-generation leaders to step forward and continue to push the industry forward, as the adapt to the evolving needs of investors.

4.

Private wealth clients continue to embrace alternatives

with a preference for vehicles that provide efficient exposure to private markets, while vetting them carefully to avoid liquidity mismatches and other operational concerns.

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