



### INSTICUBE completes major questionnaire overhaul

At INSTICUBE we pride ourselves on asking questions that get to the heart of what matters most to our members when it comes to value and service.

For this reason, earlier this year we initiated a major project to overhaul and update the questions that we use to assess an asset owner's experience with their asset managers.

With the goal of creating extended scope with less questions, and using feedback from our asset owner users, we implemented a number of changes. The most important are summarised below.

Overall we have reduced the length of the questionnaire by **18%**. We were able to introduce new optional questions on onboarding and termination, allowing investors to reflect on their full journey with an asset manager.

We were also able to better differentiate between pooled and segregated mandates, with pooled mandates now asked a smaller set of around **50** relevant questions, which cover the key areas for investors in these products.

These changes will not only improve the speed and ease of the reporting process, but also ensure a clear focus on each individual topic. For example in the case of fees- where we have created a dedicated section to differentiate it from value delivered.

In some areas, such as ESG, the ever-increasing complexity of the topic called for a range of new questions to be included, covering implementation, reporting, the carbon footprint of portfolios, and regulatory changes.

With the changes already live on the platform, we hope that when you come to complete your next INSTICUBE report you will find the process more user-friendly and the questions thought-provoking. We look forward to your feedback.

