



PFA Forum – Global Trend of Pension Fund Investment and Governance

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J.P.Morgan

Custodian's support for pension transparency and governance

GOVERNANCE

MARKETS AND REGULATION

- ▶ Global regulatory changes
- ▶ Market entry
- ▶ Country specific regulatory requirements
- ▶ Thought sharing



POST-INVESTMENT SUPPORT

- ▶ Asset safety and operational risk management
- ▶ Management of settlement risk
- ▶ Asset class expansion
- ▶ Integrated support for in-house and external managed portfolios
- ▶ Investment compliance ruling monitor (e.g. ESG, SRI)



EFFICIENCY AND RETURN

- ▶ Efficiency
 - Effective operating model
 - Data delivery and integration
- ▶ Returns
 - Securities lending
 - Custody foreign exchange (FX)



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