



ORC

*Raising Institutional
Investment Standards*



Nigel Morriss, CEO

Our Mission

“At ORC, our goal is simple: to be the world's most respected financial services advisory firm, providing effective specialist solutions to global institutional investment organizations.”



Our Purpose



With presence in London and Abu Dhabi, ORC is a leading global provider of **cutting-edge advisory solutions**.



Partnering with prominent financial institutions, ORC helps its Clients **understand their end-to-end risk landscape**.



ORC supports Clients in actively **managing their risk exposure** across the asset management continuum.



Collaborating with some of the most respected financial institutions, ORC **drives change within financial services**.

ORC

Our Credentials

Entrusted
with over
**US\$ 1.5
trillion***
Assets Under
Advice



Trusted advisor to
leading asset
owners & managers
and top tier global
financial institutions



**Senior team of industry
practitioners with over 115
years of combined
experience**

**Excluding bank clients.*



Our Client Solutions



Our Commitment to Technology

We combine sophisticated automation through our strategic partner, Dasseti, a NASDAQ-Ventures backed software provider, with our experienced qualitative overlay to provide our Clients with unparalleled data access combined with advanced analytics, allowing them to effectively and efficiently understand and manage their risk profile.

Our Core Values



Institutional Solutions

We provide our Clients with institutional solutions for their complex needs.



Partnership

We partner with Clients and support them on every step of their journey.



Client Centric

We listen to our Clients and provide bespoke, tailored solutions to achieve their desired outcomes.



Driving Change

We work with our Clients and industry peers to drive transformational change.



Professional Excellence

We are not generalists, rather deeply experienced subject matter experts and practitioners.



ORC

Our Competitive Edge

We have **extensive, demonstrable experience** partnering with leading asset owner and management institutions.

We combine a **sophisticated technological solution with an experienced qualitative overlay** to provide bespoke risk insights.

We are known for our **expert advice**, promoting alignment with **best practice standards**.

We **influence change and raise standards** in the asset management, custody, and asset servicing sectors.



Maria Long
Partner

“At ORC, we leverage our deep and extensive advisory experience to support our Clients and drive change on a global scale.”

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Our Thought Leadership

We are a respected thought leader and contribute to industry critical thinking and standard setting

ORC's Latest Thought Pieces

Navigating ODD Challenges - Emerging Managers

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Addressing the risks of Emerging Managers (EMs) is a critical challenge for investors. This article explores the risks associated with EMs and provides insights into how investors can navigate these challenges effectively.

Key Takeaways:

- EMs often lack established track records and robust risk management frameworks.
- Operational risk is a significant concern, particularly in the early stages of an EM's career.
- Investors should conduct thorough due diligence and implement robust risk mitigation strategies.

ASUITE

DETERMINE ESG MEASUREMENT CRITERIA

Compliance, Risk and Impact: Considerations for the Selection of Data and Metrics

This article discusses the challenges of selecting appropriate ESG measurement criteria and provides a framework for making informed decisions.

Key Takeaways:

- ESG measurement criteria should be aligned with the company's business model and risk profile.
- Compliance and risk management are critical factors in the selection process.
- Impact measurement should be used to assess the company's contribution to society and the environment.

ODD Partnerships: The Power of Co-Sourcing

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Exploring the benefits of ODD (Operational Due Diligence) partnerships and co-sourcing. This article highlights how these partnerships can enhance risk management and operational efficiency.

Key Takeaways:

- Co-sourcing allows for the sharing of expertise and resources, leading to more comprehensive risk assessments.
- Partnerships can help identify and mitigate risks that might otherwise go unnoticed.
- Co-sourcing is particularly beneficial for complex and high-risk transactions.

[Find out more on our Website](#)

Our Senior Team



Nigel Morriss
Founder & CEO

Due Diligence

Operating Model Transformation

Risk Advisory

Custody Solutions



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Partner

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