

United Nations Procurement Division

REQUEST FOR EXPRESSION OF INTEREST (EOI)

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Title of the EOI:

Investment Research Services for UN Joint Staff Pension Fund

Date of this EOI: 18 September 2024

Closing Date for Receipt of EOI: 15 October 2024

EOI Number: EOIUNPD23091

Beneficiary Country/Territory: Global

Commodity/Service category: Professional Services

Address EOI response by fax or e-mail to: d (26rovid0tre)Tj (695 9P/Territory:)Tj /FAAAAI 11 Muhamm l

DESCRIPTION OF REQUIREMENTS

The Office of Investment Management (“OIM”) of UNJSPF, is seeking Investment Research Providers (“IRP”), as explained below.

1. OIM is seeking an IRP for a period of 3 years (with provision for extension for 2 years, renewed annually) that will support OIM’s investment decisions by providing a wide range of independent investment research. The coverage should include, but is not limited to, macro-economic analysis, coverage of the Fund’s asset classes, asset allocation, currency, commodities, geopolitical risks, and global sector/industry. The provider should also have the ability to provide sector level research at global/ regional and country level.
2. The research includes investment strategy and research on global, regional, country level as well as sector and preferably security level; ad hoc, weekly, monthly, quarterly and annual investment analysis regarding various asset classes (equities, bonds, foreign exchange, alternative investments) and sectors as well as geopolitical and economic research and analysis.
3. The research provider should have expertise in various tactical asset allocation research aspects such as global strategy, regional strategy and provide regular investment commentary that analyzes not only the most recent and important economic and market events but also longer commentary that illustrate longer themes and trends.
Research items may include, but not limited to:
 - Focus on Big picture (Macro) view.
 - Monetary policy analysis and implications on investments.
 - Geopolitical analysis and implications on investments.
 - Develop optimal country or asset allocation strategies in light of economic and political risks.
 - Commentary as well as supporting charts and data.
 - Provide charts and analysis on request.
 - Provide meetings/calls with analysts on an ad-hoc basis for Q&A/discussions.
4. Investment advisory will need more than one advisory due to complexity of the current investment and geopolitical landscape is complex. OIM's seeks a wide range of views to help us make investment decisions.

Overview of the Fund

5. The United Nations Joint Staff Pension Fund (“UNJSPF” or “the Fund”) was established by the General Assembly of the United Nations (“UN”) to provide retirement, death, disability and related benefits for the staff of the UN and other international intergovernmental organizations admitted to membership in the Fund.
6. The UNJSPF is a defined benefit fund, with over \$92 billion under management as of 30 June 2024. The asset classes in which the Fund invests consist of global developed, emerging, and frontier market equity; fixed income; real assets (real estate, infrastructural assets)

SPECIFIC REQUIREMENTS / INFORMATION (IF ANY)

VENDOR RESPONSE

EOI INSTRUCTIONS

1) Registering as a Vendor with the United Nations

Vendors interested in fulfilling the requirement described above must be registered at the UN Global Marketplace (www.ungm.org) with the UN Secretariat in order to be eligible to participate in any solicitation. Information on the registration process can be found at <https://www.un.org/Depts/ptd/vendors>.

Prerequisites for Eligibility

In order to be eligible for UN registration, you must declare that:

- A. Your company (as well as any parent, subsidiary or affiliate companies) is not listed in, or associated with a company or individual listed in:
 - I. the Compendium of United Nations Security Council Sanctions Lists (<https://www.un.org/securitycouncil/content/un-sc-consolidated-list>), or
 - II. the IIC Oil for Food List website or, if listed on either, this has been disclosed to the United Nations Procurement Division in writing.
- B. Your company (as well as any parent, subsidiary or affiliate companies) is not currently removed or suspended by the United Nations or any other UN organisation (including the World Bank);
- C. Your company