

TITLE:

Leveraging Data & Analytics for Investment Decision-Making

AUTHOR:

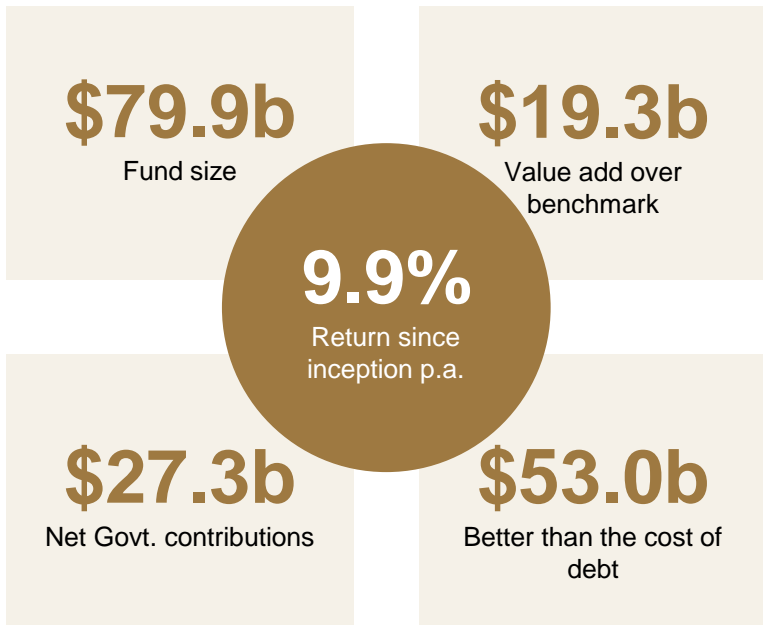
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EVENT | PRESENTATION:

2025 New Zealand Capital Market Symposium Programme | June 2025

Summary of the NZ Super Fund

- Invests money on behalf of the New Zealand Government to help pay for the increased cost of universal pension entitlements in the future
- Long-term, growth-oriented investor
- Strong equity investor
- \$8.4bn invested in NZ (11%)
- Fund returned 14.9% 2023/24
- Average returns since inception 9.9% p.a.
- \$53.0bn more than NZ T bills
- \$19.3bn more than market benchmark



As at 30 April 2025

Data Analytics

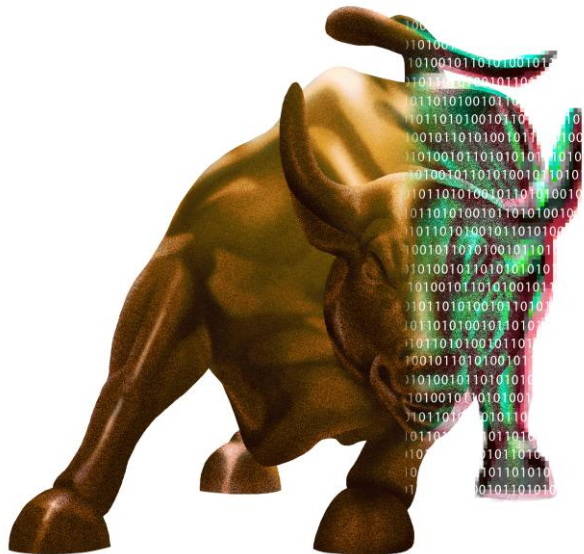


Data Analytics team purpose in action

- Centre of excellence and enablement in data analytics to support investment excellence, create efficiencies, and mitigate risk.

What it looks like:

- Data Analytics as a team sport
- Investment excellence
- Enhance productivity
- Mitigate risk



Ways of working and our competitive advantage

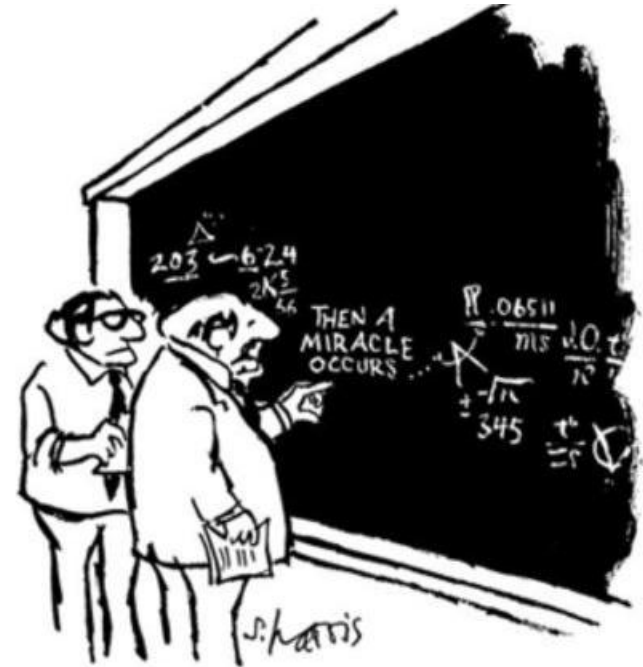
- Investment team with enterprise functions in quantitative modelling and data leadership
- Problem formulation and investment goal alignment



Talent and skills

Soft skills: Translator and collaborator, curiosity, ability to see full picture and communicate clearly at different levels

- Data and math geeks with investment acumen



"I think you should be more explicit here in step two."

**Investment
Strategy + Data
+ Model**

=

**Optimised,
Actionable
Decision**



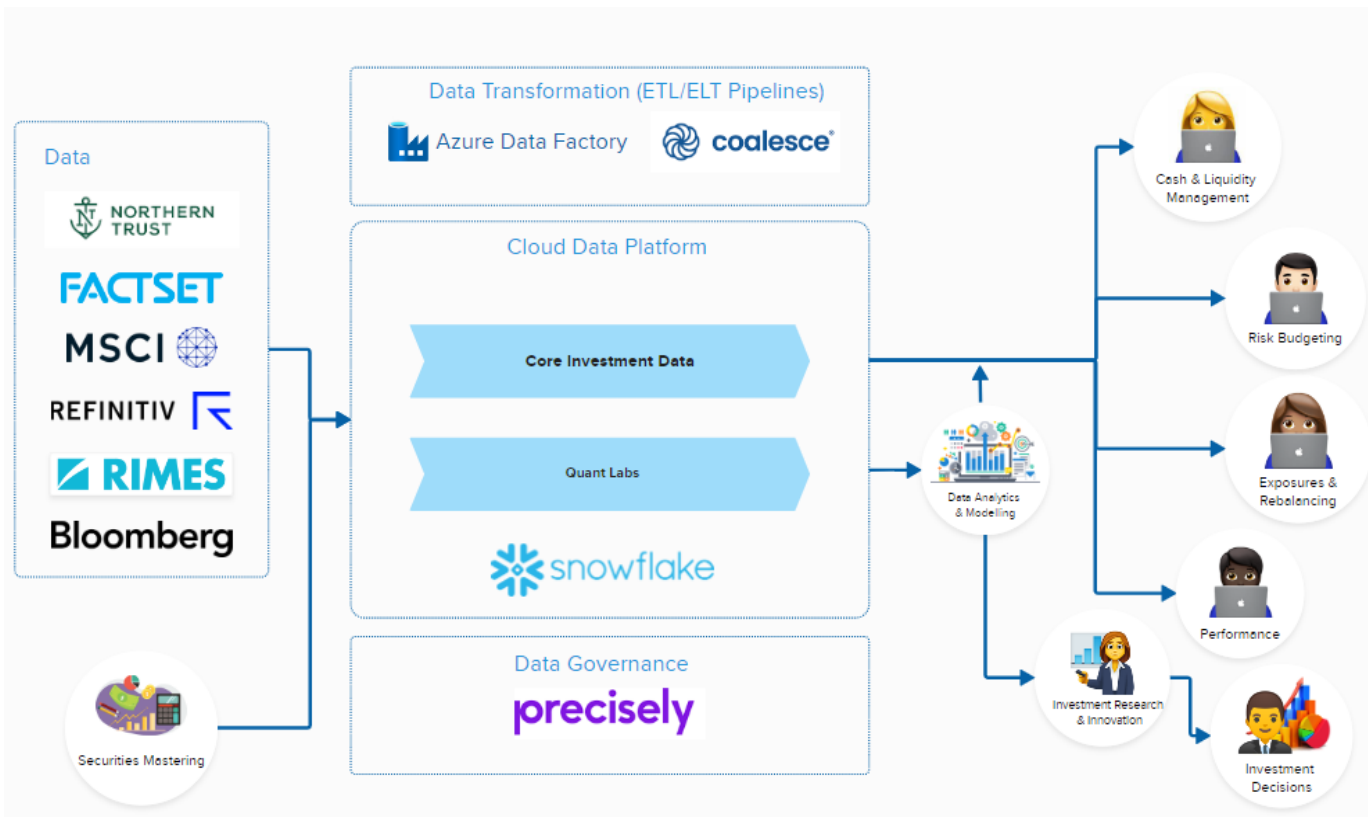
Structure and technology



Data Analytics in NZSF structure



Data & analytics tooling



Summary



Takeaways

- Data and analytics can be a competitive advantage and strategic differentiator relative to peer
- Talent, a clear remit, and an efficient operating model are critical to success
- Right-sized governance is important to agility
- Early wins are important to securing broad, deep stakeholder support
- Systems and data are only part of the equation

Questions?

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"What was initially thought to be a simple process is in fact an incredibly complicated, intricate, and complex system that I've codified and organized into a few easy-to-follow rules that are more difficult to implement than you'd think."

HOW LONG CAN YOU WORK ON MAKING A ROUTINE TASK MORE EFFICIENT BEFORE YOU'RE SPENDING MORE TIME THAN YOU SAVE?
(ACROSS FIVE YEARS)

		HOW OFTEN YOU DO THE TASK					
		50/DAY	5/DAY	DAILY	WEEKLY	MONTHLY	YEARLY
HOW MUCH TIME YOU SHAVE OFF	1 SECOND	1 DAY	2 HOURS	30 MINUTES	4 MINUTES	1 MINUTE	5 SECONDS
	5 SECONDS	5 DAYS	12 HOURS	2 HOURS	21 MINUTES	5 MINUTES	25 SECONDS
	30 SECONDS	4 WEEKS	3 DAYS	12 HOURS	2 HOURS	30 MINUTES	2 MINUTES
	1 MINUTE	8 WEEKS	6 DAYS	1 DAY	4 HOURS	1 HOUR	5 MINUTES
	5 MINUTES	9 MONTHS	4 WEEKS	6 DAYS	21 HOURS	5 HOURS	25 MINUTES
	30 MINUTES		6 MONTHS	5 WEEKS	5 DAYS	1 DAY	2 HOURS
	1 HOUR		10 MONTHS	2 MONTHS	10 DAYS	2 DAYS	5 HOURS
	6 HOURS				2 MONTHS	2 WEEKS	1 DAY
	1 DAY					8 WEEKS	5 DAYS