

**United Kingdom-Leicester: Financial and insurance services**  
**OJ S 246/2021 20/12/2021**  
**Contract award notice**  
**Services**

**Legal Basis:**

Directive 2014/24/EU

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**Section I: Contracting authority**

**I.1. Name and addresses**

Official name: De Montfort University

Postal address: Finance, The Gateway

Town: Leicester

NUTS code: UKF21 Leicester

Country: United Kingdom

Contact person: Simon Palethorpe

E-mail: [Simon.Palethorpe@dmu.ac.uk](mailto:Simon.Palethorpe@dmu.ac.uk)

**Internet address(es):**

Main address: <https://in-tendhost.co.uk/demontfort/asp/Home>

Address of the buyer profile: <https://in-tendhost.co.uk/demontfort/asp/Home>

**I.4. Type of the contracting authority**

Body governed by public law

**I.5. Main activity**

Education

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**Section II: Object**

**II.1. Scope of the procurement**

**II.1.1. Title**

Investment Strategy and Management of Cash and Endowments

Reference number: 1171 / 18

**II.1.2. Main CPV code**

66000000 Financial and insurance services

**II.1.3. Type of contract**

Services

**II.1.4. Short description**

The University invites tenders from Investment advisors to create, implement and manage an Investment Strategy for Cash and Endowments. The initial requirement is for the creation of a DMU Investment Strategy, this is expected to commence immediately following contract award with a firm completion date for the initial strategy by the 15 May 2019. This strategy will then be presented for approval at the Finance and Human Resources Committee on the 20 June 2019. After the Investment Strategy is approved, the Investment Advisor will be responsible for implementation of the Investment strategy through suitable Investment Managers and ensuring the on-going review and management of investment arrangements. The procurement

documents are available for unrestricted and full direct access, free of charge, at: <https://intendhost.co.uk/demontfort/asp/Home>

#### **II.1.6. Information about lots**

This contract is divided into lots: no

#### **II.1.7. Total value of the procurement**

Value excluding VAT: 250 000,00 GBP

### **II.2. Description**

#### **II.2.2. Additional CPV code(s)**

66000000 Financial and insurance services, 66100000 Banking and investment services, 66120000 Investment banking services and related services

#### **II.2.3. Place of performance**

NUTS code: UKF21 Leicester

Main site or place of performance:

#### **II.2.4. Description of the procurement**

To appoint a suitably-qualified Investment Advisor to create, implement and manage an Investment Strategy for Cash & Endowments for the university.

#### **II.2.5. Award criteria**

Price

#### **II.2.11. Information about options**

Options: no

#### **II.2.13. Information about European Union funds**

The procurement is related to a project and/or programme financed by European Union funds:  
no

#### **II.2.14. Additional information**

### **Section IV: Procedure**

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#### **IV.1. Description**

##### **IV.1.1. Type of procedure**

Open procedure

##### **IV.1.3. Information about a framework agreement or a dynamic purchasing system**

##### **IV.1.8. Information about the Government Procurement Agreement (GPA)**

The procurement is covered by the Government Procurement Agreement: yes

#### **IV.2. Administrative information**

##### **IV.2.1. Previous publication concerning this procedure**

Notice number in the OJ S: [2018/S 245-561256](https://eur-lex.europa.eu/eli/s/2018/245-561256)

##### **IV.2.8. Information about termination of dynamic purchasing system**

##### **IV.2.9. Information about termination of call for competition in the form of a prior information notice**

## Section V: Award of contract

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**Contract No:** 1171

**Title:**

Investment Strategy & Management of Cash and Endowments Tender

A contract/lot is awarded: yes

### V.2. Award of contract

#### V.2.1. Date of conclusion of the contract

01/12/2020

#### V.2.2. Information about tenders

Number of tenders received: 7

Number of tenders received from SMEs: 0

Number of tenders received from tenderers from other EU Member States: 0

Number of tenders received from tenderers from non-EU Member States: 0

Number of tenders received by electronic means: 7

The contract has been awarded to a group of economic operators: no

#### V.2.3. Name and address of the contractor

Official name: JP Morgan Chase & Co.

Postal address: 25 Bank Street, Canary Wharf

Town: London

NUTS code: UKI London

Country: United Kingdom

The contractor is an SME: no

#### V.2.4. Information on value of the contract/lot

Initial estimated total value of the contract/lot: 250 000,00 GBP

Total value of the contract/lot: 249 000,00 GBP

#### V.2.5. Information about subcontracting

## Section VI: Complementary information

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### VI.3. Additional information

### VI.4. Procedures for review

#### VI.4.1. Review body

Official name: High Court of Justice

Postal address: The Strand

Town: London

Postal code: WC2A 2LL

Country: United Kingdom

#### VI.4.3. Review procedure

Precise information on deadline(s) for review procedures:

### VI.5. Date of dispatch of this notice

15/12/2021

