

From: IPEM News news@ipem-market.com
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To: invest@idvector.com



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The Weekly Spin - July 29th

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In a strategic move reflecting evolving market dynamics, the Pennsylvania Public School Employees' Retirement System (PSERS) has judiciously pruned its private equity holdings, offloading even top-tier funds in the secondaries market to recalibrate its portfolio.

This proactive rebalancing, far from signaling a retreat, underscores a sophisticated commitment to long-term allocation targets, as PSERS places forward-looking emphasis on the burgeoning opportunities within private credit and infrastructure. The approach suggests that harvesting performance in top quality funds and shifting them on to secondary buyers, while they still offer attractive return potential, could further help drive up the quality of assets. It is another sign that PE secondaries are evolving nicely, with more attractive options available to buyers while investors rebalance their portfolios. Time to go with the flow and think about selling those 'hall of fame', rather than 'faded fame' assets.

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