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The UK & Europe Allocator Map Just Got a Lot More Complete

Two datasets are live in Dakota Marketplace today, and three more are on the roadmap — all five extracted directly from primary-source filings, resolved to named people and managers, and refreshed on each institution’s own publishing cadence.

1,620	19,000	104	£480bn	736
UK INVESTING CHARITIES	NAMED TRUSTEES	LGPS FUNDS & POOLS	LGPS ASSETS MODELLED	MANDATE EVENTS LOGGED

UK & EUROPE DATA EXPANSION

TWO DATASETS LIVE · THREE ON THE ROADMAP · AS OF 8/24/26

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If you cover institutional or wholesale distribution anywhere in the UK or Europe, you already know the real problem isn't finding names — it's finding out what they actually hold, who they use, and when that's about to change. The filings exist. Almost nobody has the patience to read them at scale, charity by charity, fund by fund, insurer by insurer. Dakota just did.

Here's where the build stands: two datasets are live in Marketplace today, three more are on the roadmap. All five follow the same playbook — go to the primary source documents, extract at scale, resolve to named people and managers, and keep it refreshed on the institution's own publishing cadence.

LIVE NOW

1. UK Charities & Endowments

1,620 UK investing charities with more than £10m in invested assets — $234bn combined — with 19,000 named trustees and 2,700+ manager and adviser relationships, extracted from each charity's own filed accounts. 91% of it is net-new to Dakota. It refreshes weekly with a monthly delta drop, automatically.

This is Dakota's thinnest international channel, now filled in. And it's worth more than the charity coverage alone — trustees at these institutions frequently sit on family office and other allocator boards too, so this build cross-pollinates relationships you're already trying to build elsewhere.

2. UK LGPS — the entire universe

All 98 local government pension funds and all 6 investment pools, roughly £480bn, modelled directly from committee papers, Investment Strategy Statements, and annual reports. Manager-level holdings for 90 funds, strategy/adviser/pooling detail for 97, and a live feed of mandate events — searches, appointments, terminations, allocation changes — 736 logged to date, mapped to Dakota accounts.

If you've used Dakota's Public Plan Minutes or Public Pension Investments products in the US, this is the direct UK equivalent, at full universe depth on day one.

See this data live in Marketplace

UK charities and LGPS coverage are loaded and refreshing automatically today. Book time with our team for a walkthrough of the international investor database.

Book a Demo →

COMING NEXT

3. European Sub-Advisory / UCITS — the biggest prize

In Europe, retail investors mostly don't buy funds from fund managers — they buy them from their bank or insurer. An Italian bank's customers buy the bank's own branded fund. But the bank usually isn't the one managing that money: it quietly hires a specialist investment firm to run it. That arrangement is sub-advisory, and roughly €1tn in Europe works this way.

A real example from our first day of data: Mediolanum, a major Italian bank, sells its customers a fund called "Best Brands Global Leaders." Mediolanum doesn't pick the stocks — it pays Axiom Investors, a Connecticut firm, to do it. A year earlier, that seat belonged to a different firm, Intermede, before Mediolanum swapped them out.

Here's why that matters if you raise capital: these banks are professional hirers of managers. Winning a seat means a $100m–$1bn mandate that pays fees for years, and it's one of the only ways a US or UK manager reaches European retail money without building a European sales force from scratch. Winning a seat comes down to four things — who hires this way, what they hire for, who holds the seat today, and when a seat is about to open, because a firing is a live sales opportunity with a clock on it. That's exactly what we're extracting: sponsor-to-sub-adviser mapping by asset class, domicile, and fund size, with appointment and termination changes pulled straight from prospectus updates. Piloting Ireland and Luxembourg first, out of a €1.7tn delegated-fund industry overall.

Why this beats what's out there today:

- **Almost nobody covers it.** The one specialist, instiHub, was absorbed into Allfunds in 2022, and its own customers — Artisan, on record — say quality has slipped since. There's no healthy incumbent left standing.

- **The big databases can't answer the question that matters.** Morningstar and similar platforms tell you what funds exist and how they've performed. They don't tell you that a bank fired one manager from two funds and hired another, effective this spring. That's buried in dense legal documents nobody reads systematically — except this build, automatically.
- **Every row is provable.** Sub-advisory arrangements are legally required disclosures. Rows are sourced verbatim with dates — audit-grade, not scraped guesswork — and refresh whenever the underlying documents change.
- **It lands inside Dakota, not beside it.** The same fundraiser already using Dakota for US pensions gets European platform buyers in the same fields, same taxonomy, same workflow. A new continent of buyers, zero new product to learn.

If you sell sub-advisory mandates in Europe, this is the one to watch. It's the closest thing to true whitespace on this list.

4. Solvency II Insurers

Asset-class exposures, investment performance, and key personnel for every EU and UK insurer — sourced from their annual SFCR reports and standardized QRT templates, of which more than 24,000 have been filed since 2017 and are unusually well-suited to structured extraction. This is the direct European extension of Dakota's existing US insurance product. The differentiator isn't the raw filings — anyone can find those — it's fusing the data with Dakota contacts and sales context so it's usable the moment you open it.

5. UK Private Pension Schemes — the long tail

Named managers, fiduciary arrangements, and allocations for thousands of corporate DB/DC schemes, drawn from Statements of Investment Principles, Implementation Statements, and TCFD reports, mapped against the PPF Purple Book universe of roughly 5,000 DB schemes. This is the hardest of the five to find — discovery, not extraction, is the bottleneck — and it runs opportunistically once the crawler infrastructure built for the first three datasets is in place.

Why This Is Hard to Copy

None of the underlying source material here is secret. Charity Commission filings are public. LGPS committee papers are public. SFCR reports and fund prospectuses are public. Anyone with enough patience could open every one of these documents by hand.

What nobody else does is the linking — connecting a named trustee to their charity, to that charity's actual asset allocation, to the managers already sitting in the portfolio, all inside one platform you can act on. Doing that manually means stitching together a Charity Commission filing, an annual report PDF, and whatever you can piece together on LinkedIn, one institution at a time. We're doing that linking at scale, across every dataset on this list, and putting it inside Marketplace already connected to everything else you use.

The raw material was always available. The organization and combination of it — at this scale, refreshed on a schedule, resolved to names, and sitting inside the system where you already track your accounts — is what's actually unique. That's the moat, and it's the same one behind every other product Dakota has built.

What This Means for You

Whether you cover UK charities today, LGPS mandates, or you're watching the European sub-advisory or insurance channel for where to go next — this is built around the same three things a sales call actually needs: the asset allocation, the manager lineup already in the portfolio, and the named contact with information you can use. Live data on two of these channels is in Marketplace now. The other three are coming, in roughly the order listed above.

Ready to see your coverage area?

Book time with our team to walk through the UK & Europe allocator data live inside Dakota Marketplace.

Book Time on Our Calendar →