

Solutions for Traditional Asset Managers

As an institutional asset manager, your mission is to compete successfully for and retain assets by clearly differentiating how your strategies add value to investors' portfolios. eVestment can provide you with the tools and information you need to take a strategic, holistic approach. We offer solutions to provide the best fit for your organization's needs. Choose from the Select, Core, Premium or Platinum package. **All packages include eVestment Quantum Analytics and Scorecard.**

Capabilities	Select - Asset Flows	Select - Advantage	Core	Premium	Platinum
Compare your strategy to peers	✓	✓	✓	✓	✓
Create interactive charts and tables	✓	✓	✓	✓	✓
Build custom reports and marketing materials	✓	✓	✓	✓	✓
Identify universes and products gaining interest	✓	✓	✓	✓	✓
Assess the health of universes/products	✓	✓	✓	✓	✓
Understand product marketability	✓	✓	✓	✓	✓
Rank products by growth potential	✓	✓	✓	✓	✓
Measure current sizes of markets	✓		✓	✓	✓
Analyze global movement of assets	✓		✓	✓	✓
Understand market share trends	✓		✓	✓	✓
Review potential growth markets	✓		✓	✓	✓
Identify firms that are currently winning	✓		✓	✓	✓
Evaluate in-demand geographies		✓	✓	✓	✓
Quantify viewership relative to peers		✓	✓	✓	✓
Learn why competitors are getting interest		✓	✓	✓	✓
Assess screening success rates		✓	✓	✓	✓
Quantify the impact of activities on viewership		✓	✓	✓	✓
Prioritize population of valuable data points		✓	✓	✓	✓
Identify new competitors in your market space			✓	✓	✓
Identify vulnerable competitors/their clients			✓	✓	✓
Identify complementary competitors			✓	✓	✓
Identify differentiators v. benchmark/indexes				✓	✓
Identify differentiators v. peers/active products				✓	✓
Included Dataset(s)	1 Regional & 1 Global OR 1 Alternative	1 Regional & 1 Global OR 1 Alternative	1 Regional & 1 Global OR 1 Alternative	1 Regional & 1 Global OR 1 Alternative	All Datasets Included
Additional Datasets	Available for Extra Fee	All Datasets Included			



How Traditional Asset Managers Use eVestment



Analyze the competitive landscape

With over 75 calculations for advanced statistical analysis, you can analyze how you stack up using side-by-side manager comparison, view how your strategies rank, see the fees of peers to assess fund positioning and more.

Identify products with potential for growth

Our model analyzes 120+ metrics, determining which variables are most predictive of asset flows in a particular universe. Isolate the effectiveness of distribution efforts and more clearly identify opportunities to adjust sales and marketing focus to produce the greatest impact.

Evaluate efforts and improve data quality

Better understand if your marketing efforts are successfully reaching your intended audience. Uncover key competitors by seeing who you are being compared against. Prioritize database updates by learning which data elements are searched for your specific products. Understand how many screens you are passing or failing and the reasons why.

Track industry flow trends

View which universes and asset classes are experiencing the largest inflows and outflows to help gauge demand. Learn what types of investors you should be marketing to and identify which geographies to target. Quantify market share. Learn whether you are in defensive position to retain assets or if you need to go on offense to capture assets up for grabs.

Demonstrate value to investors/consultants

Highlight your management skills by illustrating your active share, key investments and allocations that differ significantly from your peers and benchmarks. Show investors how your selection, allocation and timing decisions affected performance.

Create custom reports

Customize client-ready fact sheets, presentations and reports by dragging and dropping tables, charts and narrative text blocks into one of many layout options in our Design Lab. Choose from a library of your saved or existing templates with the ability to customize and easily export your reports to PDF.

About eVestment

eVestment, a Nasdaq company, provides a flexible suite of easy-to-use, cloud-based solutions to help the institutional investing community identify and capitalize on global investment trends, better select and monitor investment managers and more successfully enable asset managers to market their funds worldwide. With the largest, most comprehensive global database of traditional and alternative strategies, delivered through leading-edge technology and backed by fantastic client service, eVestment helps its clients be more strategic, efficient and informed.