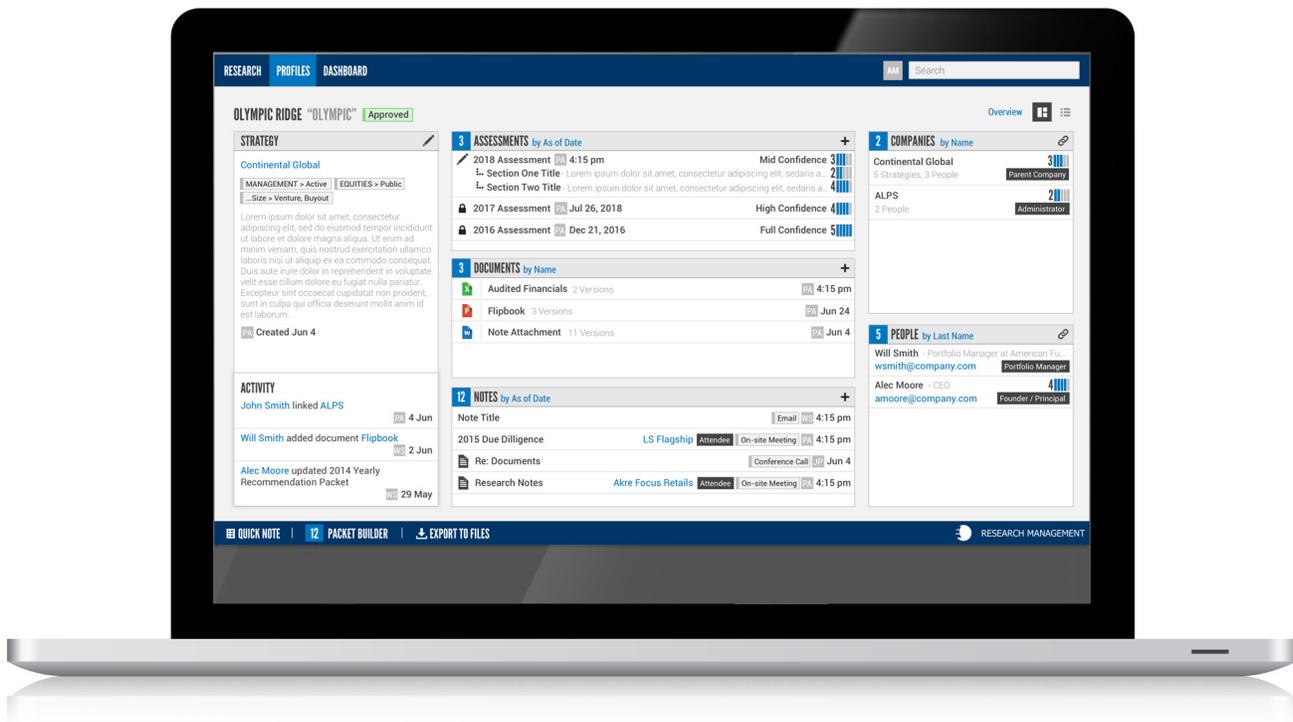


# Research Management

## Product Overview

Consultants and investors dedicate significant time and resources on investment manager research, using multiple tools to source and screen managers. Documenting this process is often an afterthought, leading to compliance risks, unscalable processes, information silos and knowledge gaps.

Built for powerful research and analysis, eVestment Research Management is a streamlined research management suite that seamlessly retains your notes, ranking assessments and documents. This powerful and intuitive platform allows all your research data to live in one place, delivering insights in real-time and providing a complete experience for the research professional.



## How Clients are using eVestment Research Management

### Content Management

Ensure documents, notes and opinions are associated with the relevant firm and product to support consultant firm decisions and compliance guidelines.

### Reporting

Create and share research reports which match branding and compliance guidelines.

### Usability

Seamlessly access content on any firm, product or professional with dynamic search and filtering tools.



# Research Management Capabilities

**Our industry-leading institutional dataset combined with research management tools provides consultants and investors with a full suite to support their manager research process.**

## EVESTMENT DATA & ANALYTICS



Source Institutional Managers



Perform Analysis & Due Diligence



## EVESTMENT RESEARCH MANAGEMENT



Catalog & Manage Research Findings



Share Research & Notes Internally

### Document Management & Search

Keep all your information in one place with document versioning, instant document preview, drag-and-drop file uploads, note linking to personnel and strategies and Outlook integration. Save time with quick navigation, content filtering and advanced saved searches.

### Compliance & Due Diligence

Ensure adherence to requirements every time with up-to-date disclosures, consistently branded reporting templates, compliance monitoring rules, customized reporting templates to match brand and compliance guidelines, a due diligence calendar and a packet builder.

### Process & Firm Opinions

Understand investment research activity. View firm-wide activity, highlight status and rank and publish recent notes to a feed. Instantly view your firm's approved manager list, manage research pipeline, customized asset classes and factors, track firm opinions over time and maintain recommendation basis.

### Integrated Notes

Capture interactions consistently through quick notes, attendees mentioned, note document attachments and note keyword searching.

#### 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.