

Investor Basics

from eVestment

You may not have a team of research analysts, but you still want access to gold-standard data on the managers you care about.

Free data
on 25,000+
institutional funds



EVESTMENT
A Part of Nasdaq

Many institutional investors don't have dedicated teams of analysts conducting deep due-diligence on institutional strategies. But they almost always value having an independent data source to reference.

That's why we created Investor Basics, to provide quick-reference data to investors who don't need robust analytics capabilities but do want to:

- Identify new, emerging managers
- Prepare questions for meetings with managers
- Quickly source performance and risk metrics on a given fund
- Stay informed about key trends in the institutional market
- Get a snapshot view of managers they've heard about
- See manager performance plotted in quartile rankings, not just compared to a benchmark
- Educate clients or stakeholders with manager data
- Get quick line-of-sight into 18,000+ private markets funds – focus and stage

Where eVestment Data Comes From

1

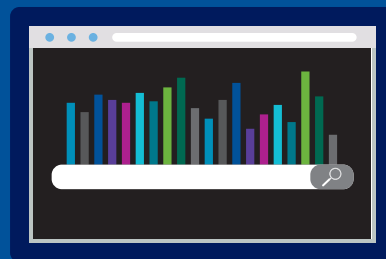
3300+

managers across the world report data on their institutional funds to eVestment every quarter



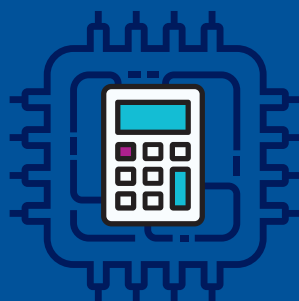
4

Finally, eVestment users search the data through our platform



3

Then, our data scientists and machine-learning algorithms derive calculations such as quartile rankings from this categorized data



2

Next, eVestment data analysts review every fund's philosophy, process and portfolio characteristics to ensure the fund is precisely categorized in the right universe



Why is Investor Basics free?

At eVestment, we see our job as relentlessly creating transparency to power institutional investing. We do that by collecting more data, deriving insights from that data and making it available to the institutional marketplace. We think it's simple: More data means more transparency, and more transparency means better outcomes.

Investors value the transparency data provides, even if they don't have the staff to drill into that data for deep analysis. We created Investor Basics to meet this fundamental need, and it's free because we think any investor with even a small allocation to institutional funds can benefit.

For investors who need more than a reference source, we do offer a suite of premium solutions with deeper data, robust analytics tools, qualitative intelligence, research management and portfolio monitoring. Please contact solutions@evestment.com to learn more about our right-size solutions for investors.

By the numbers

500+

Average number of new funds
added each quarter

904+

Number of the world's largest investors and consultants
who rely on premium eVestment solutions as the backbone of their due diligence

25,000+

Searchable institutional funds
from managers worldwide

The institutional difference

Commoditized Publicly-Available Fund Data

Typically data on retail vehicles like mutual funds

Only basic fund categories describing region, market cap and style – making true peer-comparisons difficult

Developed for retail investors with minimal investment knowledge

Institutional Data from eVestment

Much larger fund dataset, because many institutional funds are not offered in retail vehicles and will not appear in mutual fund lists

Over 674 highly granular universes for precision in search and manager comparisons

Developed for sophisticated institutional investors with advanced investment knowledge

With Investor Basics you can

Search 25,000+ institutional funds

Compare how funds are performing against other true-peer funds, not just the benchmark

Get quick line-of-sight into 18,000+ private markets funds – focus and stage

Identify emerging managers and new funds

Anonymously post RFPs to gather more data from managers, without revealing your firm

Access eVestment's proprietary research on institutional fees, consultant commentary and more

Drill into 5 full fund profiles per quarter with 2600+ data points and narratives on process, philosophy and people

Request your login

Set up only takes a couple of minutes with a member of our global support team. To request your login, please contact solutions@evestment.com.