

CASE STUDY

Insync Partners With eVestment Omni To Broaden & Optimise Its Brand Presence

Firm developed a strategy to broaden awareness of its brand by leveraging the reach of databases.

**AUD 200M**

FIRM AUM

2009

YEAR FOUNDED

Insync Funds Management is a concentrated global quality growth equity boutique founded in 2009 by Monik Kotecha and Garry Wyatt. Insync's investment philosophy is future-focused and process-positioned to benefit from global mega trends and disruption.

The firm is solely focused on funds management, whose process marries sophisticated quantitative techniques and fundamental equity analysis to build a portfolio of circa 30 highly profitable companies across 16 global megatrends. This results in a portfolio that has a low correlation of excess returns versus other managers with similar styles. Insync is majority owned by staff, and portfolio managers are invested alongside investors.

Insync's Distribution Strategy

With approximately AUD200 million in AUM, Insync has generated meaningful alpha over long periods with its flagship long-only strategy.

Having received inbound queries from offshore allocators from the "big end of town" with typically larger scale needs, Insync saw an opportunity to build a presence with smaller allocators. To capitalise on the opportunity, the firm developed a strategy to broaden awareness of its brand by leveraging the reach of databases.

Because investment consultants and large investors rely on databases to identify, screen, compare and evaluate traditional and alternative managers, Insync knew database visibility was critical. It also knew targeting would be important, as smaller allocators and consultants

were key prospects, not just the large local players. Finally, it realised an experienced database marketing partner would accelerate the strategy and be an important step toward raising new institutional assets.

Insync's Partnership With eVestment Omni

Insync chose eVestment Omni as its database marketing partner because it was looking for strategic expertise and data-driven intelligence, not just a database population service.

Together, Insync and eVestment Omni developed a plan for targeting regional and global databases with users from endowments, foundations and family offices, as well as the investment consultants that most frequently advise these nimbler allocator segments.

The plan also accounted for Insync's product mix, which includes a variant of the flagship strategy with imbedded downside protection, to ensure both long-only and hedge fund strategies had database visibility.

Database Population vs. Database Strategy

While eVestment is the institutional market's premier database, relied on by over 1,000 allocators and consultants globally, including all top

10 consultants, there are dozens of smaller and niche databases with geographic, asset class or allocator-segment focus. That's why the first component of a true database marketing strategy is identifying the right databases – those used by the prospective allocators and consultants the manager is trying to reach.

The second component of a database strategy is technology-enabled data population, to push data to multiple databases with automated validations and real-time error/success notifications.

The final component of a true database strategy is feedback intelligence for continuous improvement: Data on the fields allocators are screening, the number of screens the firm's strategies appear in, the percentage of screens a product is failing and why and the databases closest competitors are populating. These and other data points are critical for evolving a database strategy to keep up with competitive dynamics.

Insync has implemented a true database strategy that aligns with its distribution objectives and will keep the firm's brand and strategies in front of the allocators and consultants it wants to reach.