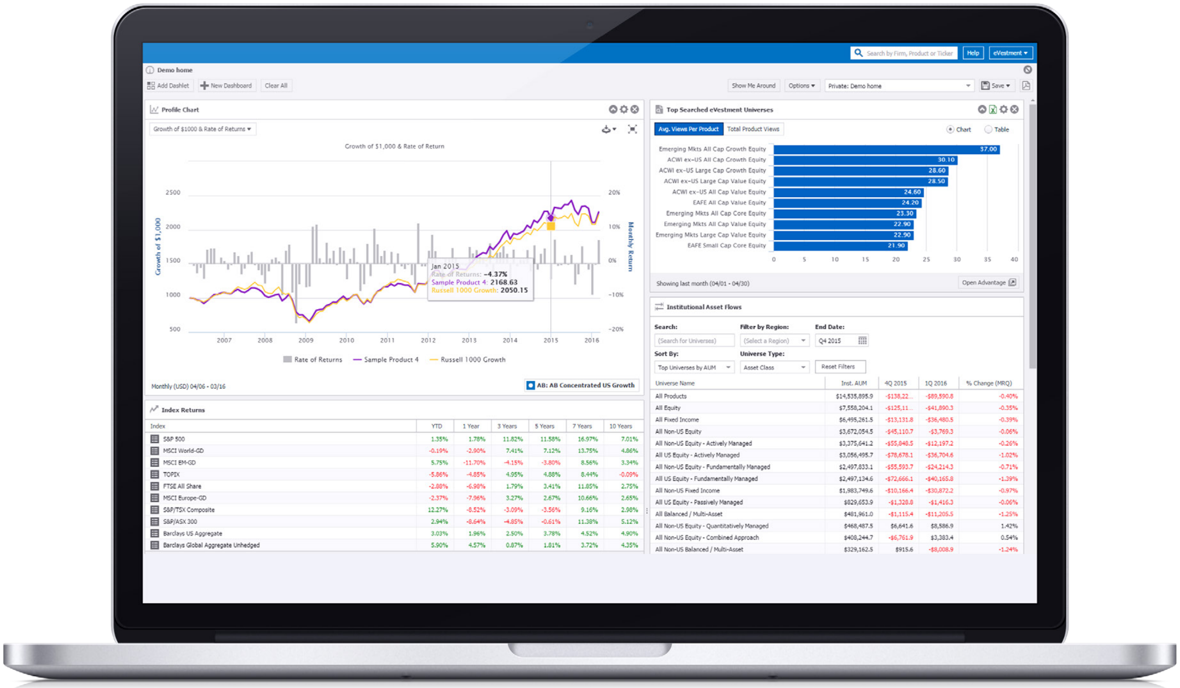
EVESTMENT®

Analytics

Product Overview

Conduct your analysis using the #1 database for the institutional investment community. With Analytics, investors and consultants can research asset managers that meet their needs along with access to tools for ongoing monitoring, building and optimizing portfolios, managing risk and creating reports. Asset managers can learn to better position funds and create customized marketing materials.

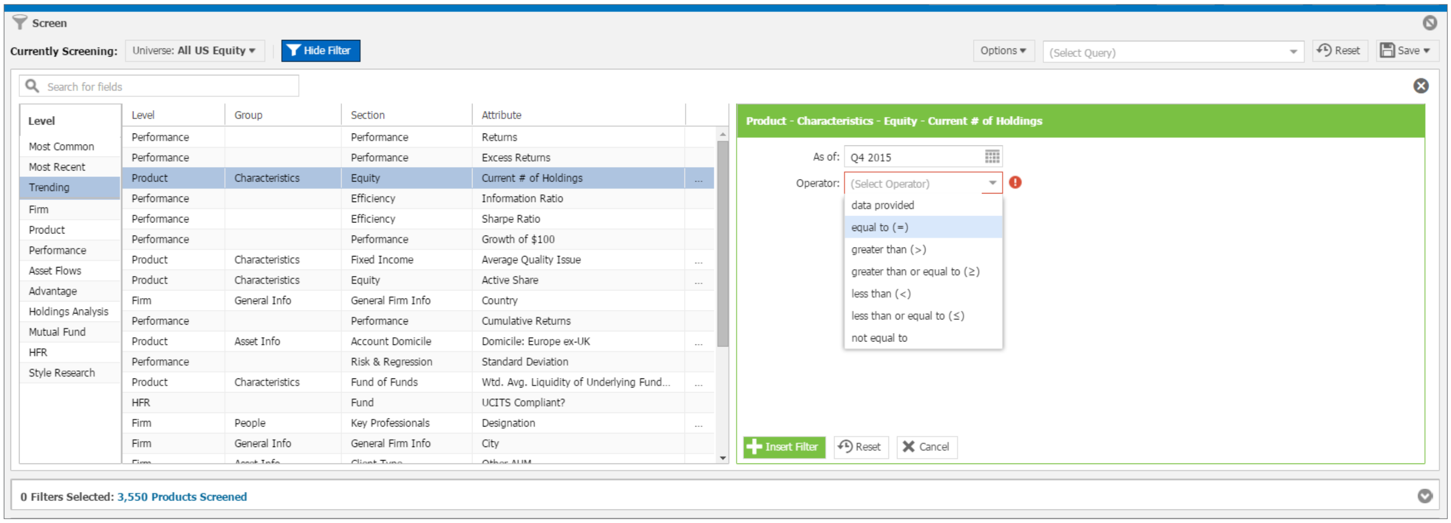
eVestment Analytics is available in distinct, tiered options serving specific client use cases. Explore our full Analytics capabilities and our specialists will work with you to discover which are the most relevant for your needs.



How clients are using Analytics

- **Competitive analysis.** Evaluate how managers stack up compared with peers and assess fund positioning.
- **Reporting and marketing materials.** Create professional presentations, fact sheets, one-pagers, charts and graphs.
- **Macro and micro analysis.** Analyze products at a broad scale with style analysis or get a detailed view of performance.
- **Manager research.** Screen and select managers across multiple asset classes — all from within one interface.
- **Ongoing due diligence and monitoring.** Monitor ongoing performance, personnel changes and other characteristics.
- **Portfolio optimization and simulation.** Build, optimize and evaluate hypothetical or active portfolios across asset classes.

Analytics Capabilities



Screening
Research across traditional and alternative strategies using thousands of data points. Integrate third-party datasets or user-entered fund information to include in your analysis.

Competitive Analysis
Gain a complete view of the competitive landscape. View side-by-side manager comparisons, see how strategies rank compared to peers, assess fund positioning and more.

Peer Comparisons
Compare a fund’s performance by dragging and dropping benchmarks and funds into interactive charts, as well as by viewing risk, correlations and historical performance tables.

Batching & Scheduling
Streamline reporting needs and increase productivity. Efficiently produce reporting or fact sheets for clients, investment committees, internal analysis or finals presentations.

Custom Reporting
Customize client-ready fact sheets, presentations and reports by dragging and dropping tables, charts and narrative text into many layout options. Customize and easily export to PDF.

Due Diligence
Monitor ongoing performance, personnel changes and other characteristics as needed. Run risk and regression analytics, efficiency, value-at-risk and many other calculations.

Portfolio Construction
Create actual or hypothetical portfolios for use in your analysis. Create composites that reflect historical allocation changes with options for rebalancing and backfilling.

Portfolio Optimization
Assess allocations relative to an Efficient Frontier and analyze portfolio diversification. Use Monte Carlo simulation to better predict probable outcomes for risk, return and asset growth.

Liquidity Tracking
View upcoming redemption possibilities and associated fees. Enter fund terms such as lock ups, redemption and notice periods, and fees to get an overview of portfolio liquidity.

Returns-Based Style Analysis
Track the style of investment vehicles across time in relation to market factors. View data in the form of style allocation bar charts, allocation area graphs and style drift maps.

About eVestment
eVestment 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.

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