

Company Overview

Meeting the needs of the institutional investment community

If you are researching fund managers, you need high quality data you can rely on – without having to make endless requests for information. If you are marketing funds, you need an efficient way to get in front of potential investors and consultants – without having to send the same information multiple times to different stakeholders. Powered by the #1 source for institutional data, eVestment provides cloud-based analytics and intelligence solutions to help our clients identify and capitalize on global investment trends and make more informed decisions.

Who we serve:

Asset Managers

eVestment provides asset managers with the tools needed to take a strategic approach to competing for and retaining assets – equities and fixed income, as well as hedge funds and private markets.

Institutional Investors

Pension plans, endowments, foundations, funds of funds, sovereign wealth funds, insurance plans and family offices use eVestment for the analytics and intelligence needed to make informed decisions.

Investment Consultants

Founded by consultants, eVestment continues to partner with our consultant clients to improve our analytics tools. Consultants use our platform to research and monitor managers on behalf of their clients.

Investment Banks

Investment bankers use eVestment to access deep insights on asset managers and institutional investing trends, anticipate in demand asset classes and geographies and to fill research gaps.

Financial Advisors

Advisors with significant institutional business or who serve high-net worth clients who need access to separate account or alternative funds can now leverage the same insight as institutional investors.

Representative clients:



BLACKROCK



EVESTMENT FACTS

Traditional vehicles in database:
49,748

Alternative vehicles in database:
29,377

\$28.2T long-only institutional
AUM reported to eVestment
(as of Q1 2018)

1.2 million annual profile views
across all client types

2,300+ unique data fields for
traditional and 500+ for alternatives

OUR CLIENTS INCLUDE

Over 850 global institutional
consultant and investor clients
representing over \$38.4T in AUM/AUA

70% of the Top 50 Largest Global
Consultants as ranked by *Pensions &
Investments* in 2017

100% of the Top 50 Asset Managers
as ranked by *IPE* in 2017

72% of the Top 50 Largest U.S. Plans
as ranked by *Pensions & Investments*
in 2017

48% of the Top 50 Largest Global
Plans as ranked by *Pensions &
Investments* in 2017



eVestment Capabilities



Research and select managers

Screen across thousands of active investment vehicles and gain deeper insight into the true drivers of value for more effective due diligence.



Increase your fund's visibility

Gain exposure to the institutional network. Prioritize your database population updates and ensure sales/marketing efforts are paying off.



Secure your data distribution

Ensure all analysis is being carried out on a consistent basis and reduce the risk of errors. Prevent the risk of unauthorized access or distribution of your track record.



Construct and optimize portfolios

Analyze and optimize portfolios using the Markowitz Efficient Frontier allocation model, Monte Carlo simulation, and returns-based style analysis.



Ensure consistency of data

Increase accuracy and timeliness of data across multiple databases. Free up time for your team to strategically focus on a greater number of growth opportunities.



Demonstrate your added value

Better understand your competition through perceived peer group analysis and holdings-based analysis. Gain insight into how you are perceived in the market.



Understand market trends

Identify which universes and asset classes are experiencing the largest inflows and outflows. Pinpoint managers who are getting attention from investors.



Anticipate future allocations

Keep up to date with public plan manager searches and presentations. Access actual documents, board meetings videos, asset allocations and more.



Create custom reports

Easily export full dashboards of your analysis, or handpick individual graphs and charts. Reports can be branded to fit seamlessly into existing materials.

Our clients say:

"I truly believe that for firms that are serious about growing and adapting to an ever-changing marketplace, eVestment is a must-have. The fact that eVestment is a neutral database, used by a variety of different firms, is important. Also, the quality of the information and the high degree of user-friendly features of the system used to conduct and generate competitive analysis from that data, is extremely valuable."

**VP Consultant Relations and Business Development,
Institutional Markets, Fiera Capital**

"When I prepare for a meeting with a potential new manager, my data source is eVestment. Without updated data in eVestment, my preparation for the meeting is insufficient and the quality of the meeting declines. It's a lose-lose situation for me and the manager."

**Senior Portfolio Manager
PFA Pension**

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.