

Distribution Insight: The complete picture, delivered.

Market trends can shift and reverse in an instant. To act decisively, you need access to timely, relevant information. Distribution Insight delivers the market data, analytics and expert commentary you need to see asset flows, predict trends, assess risk and locate opportunities across U.S. and global markets.

DATA, ANALYTICS AND INSIGHTS—ALL ON A SINGLE PLATFORM

Complete Market View

See the whole picture. Covering retail and institutional across every geography and every vantage, Distribution Insight helps asset managers understand market share, product sales, best opportunities and advisor preferences.

The Most Trusted Data

Rely on a solid foundation. Distribution Insight data is expertly curated via proprietary data aggregation processes, drawing from multiple data sources, including the most robust consortium of asset managers.

Powerful Analytics and Data Visualization

Answer key business questions. Analyze, evaluate and explore data, then visualize trends by segment, channel, market, demographics, asset class and more.

Expert Perspective

Turn insight into action. Take advantage of industry-leading analysis and commentary from a team of in-market experts.

A GLOBAL MARKET VIEW



\$60T

OF GLOBAL
ASSETS TRACKED

\$20T

INSTITUTIONAL
ASSETS TRADED

\$14T

U.S. FUND AND ETF ASSETS BY
DISTRIBUTOR AND OFFICE



See. Act. Win.

Plot your next move with total confidence.

U.S. DISTRIBUTION

Unique U.S. insights and proprietary capabilities

MARKET ANALYTICS

Gain the intelligence you need to analyze product trends and market share.

- Access proprietary fund and ETF data for all retail and institutional third party distribution channels
- Assess trends on AUM, Net Flows and number of shareholders to understand the competitive landscape and how your business stacks up.
- Capture growth rates over time by seeing how clients have moved in and out of positions across the industry.

SALES ANALYTICS

Understand your sales trends and performance with dynamic daily transactional data.

- Visualize sales by office, territory, channel, advisor or wholesaler.
- Aggregate key market data and consolidate sales and asset reports.
- Identify top producers.

OPPORTUNITY HUNTER

View in-depth profiles of RIAs, Broker/Dealers and Banks—and pinpoint those most likely to sell your products.

- Prioritize prospects based on AUM, assets held for investment, Morningstar category, number of plans, and more.
- Compare your funds against the actual investments managed by each advisor or investment consultant.
- Start better conversations when you're able to highlight the key advantage of your products versus the products that prospect is currently using.

INVESTOR ANALYTICS

Achieve unmatched insight into the demographics of investors, including their comprehensive investment profiles.

- Compare your investor demographics versus the rest of the industry.
- Identify key market segments.
- Target campaigns with more relevant messaging.

GLOBAL MARKET INTELLIGENCE

Unparalleled view of global fund data

FUNDFILE

Deep dive into domestic fund markets across the globe. Access comprehensive mutual fund and ETF data at a unique level of detail.

- Track over 80,000 funds sold globally each month.
- Draw on multiple data feeds from licensed and public data sources, including Morningstar, Lipper, Broadridge, and more.
- Run competitor analyses, scorecards and fund range comparisons.
- Map the product innovation landscape for new trends and benchmarking.

SALESWATCH

Analyze cross-border funds. Perform geographical, asset class and sector analysis of cross border assets and flows along with your relative positioning.

- Pinpoint your true opportunity by using gross sales metrics to measure the actual value of assets changing hands.
- Take advantage of benchmarking capabilities, with the capacity to measure the evolution of your asset share and flow versus your competitors.
- Disaggregate the cross-border market by geography to reveal product preferences by fund market.

MONEY IN MOTION

Delivers robust analysis of the global institutional opportunity by generating AUM, flow, fee and revenue metrics at a unique level of detail.

- Track \$25T in global Institutional assets
- The largest data sharing syndicate of its kind augments with secondary datasets from leading industry sources to deliver the best source for global institutional market analytics
- Analyse essential asset, flow and fee data at a unique level of detail.
- Get a true picture of market share and share of flows.

Wherever the market moves, respond with total confidence.

LEARN MORE.

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Ready for Next