

Powerful insights across the asset management industry



Distribution Insight provides independent research from experts utilising the best analytics in the global asset management industry.

Our Insights services offer in-depth analysis of critical trends in product demand and distribution for both retail and institutional client segments.

INSIGHTS FOCUSED ON

Trend analysis

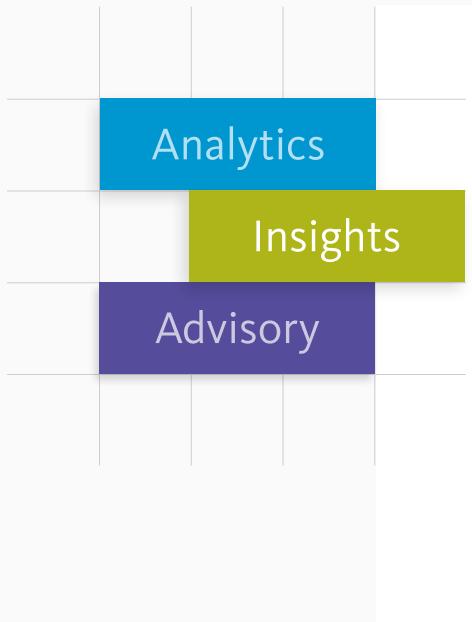
Product demand

Channel dynamics



Broadridge Distribution Insight provides everything you need to make informed decisions

1. Best-in-class global data and **analytics** tools for asset management distribution
2. In-depth, unique, and up-to-date research **insights** on key areas driving asset management markets
3. **Advisory** capabilities from a consultant team of global subject matter experts



THE INSIGHTS MISSION

Discover the key trends separating speculation from fact

Reveal demand hotspots and emerging areas of interest

Understand channels and distribution in key markets

Our Insights services are at the heart of the Broadridge Distribution Insight platform

Insights

Our global research focuses on product and channel — spanning APAC, Europe, LATAM, and US — and covering core trends and topics such as retirement, product innovation, the growth of China, and ESG.

Analytics

Our market-leading Analytics solutions are designed to answer key business questions.

Our Analytics products provide comprehensive global coverage of asset flows and fees; as well as data on product development and sub-advisory relationships.

Advisory

Our expert Advisory team will work with you to design practical and realistic distribution strategies that lead to real world results.

A range of Insights designed to help you identify new market opportunities

Use our five Insights products to explore critical issues.

TREND ANALYSIS



Separate the signals from the noise and inform your retail and wholesale business with a comprehensive, regular source of reliable data and insights.

PRODUCT DEMAND



Helping you build product ranges that are fit for the future while providing support that drives business growth.

Prism

In-depth and cross-channel interpretation of opportunities, product development trends, and competitive dynamics by sub-asset class.

CHANNEL DYNAMICS



Guiding you to market entry or growth opportunities in existing and emerging asset pools.

Navigator

An annual service designed to form the foundation of your business planning for growth in key client segments.



TREND ANALYSIS

Radar is a series of publications that synthesise asset management market intelligence into digestible outputs to inform decision-making.

Radar includes a detailed analysis of:

- What is – and isn't – selling
- Which of your competitors are excelling and why
- What the regulators are planning for the future
- What the outlook is for asset growth and sales flows

PACKAGE OPTIONS:

Europe

APAC

LATAM

USA



O Perspectives

PRODUCT DEMAND

Product Innovation Perspectives enables a deeper understanding of the drivers behind successful product launches, equipping product teams with clear, incisive indicators and an in-depth analysis of clients' changing demands.

What's included?

- Ten key strategy questions for product teams to consider
- Examination of industry trends through cross-border, regional, and global lenses
- Success metrics: What managers and strategies are winning business, and why?
- Regional and international innovation successes
- Selectors' future innovation needs
- Multimedia access points including six monthly in-depth reports
- Monthly market barometer and webcasts

PACKAGE OPTIONS:

Global

If you thought failures were high in Europe, try APAC



COMMENT

Achieving a successful fund launch is hard even with a low failure rate. In other words, it's not all about failure, which makes the success rate period analysed here, in other words, of the 27,000 funds launched, 18,000 fell short of the target.

Regionally there are differences, but the point remains: more launches do not succeed. APAC is particularly challenging at 70% of funds failed to attain that magic 40% target. At the other end of the spectrum, a paltry 56% of funds in EMEA surpassed their 40% success rate in Europe and 58% in the US.

Source: Broadridge data as of 30 September 2010. Data exclude money market, fund of funds, protected, guaranteed, and target maturity products; unless stated. Data include funds launched between Q1 2010 – Q1 2011, measuring the maximum value of assets under management at the time of launch. Funds must have been in existence for at least three years by Q1 2011.

Broadridge Product Innovation Perspec-



Prism

PRODUCT DEMAND

Prism is the definitive source of in-depth asset class intelligence.

It offers a unique cross-channel examination of opportunities, product development trends, and competitive dynamics by sub asset-class (e.g. thematic equities, emerging markets debt, and direct lending).

Each of the asset class services offers quarterly reports, which include two special topic deep dives per quarter. We cover 32 special topics a year in the Prism series, two topics each quarter in each asset class.

PACKAGE OPTIONS:

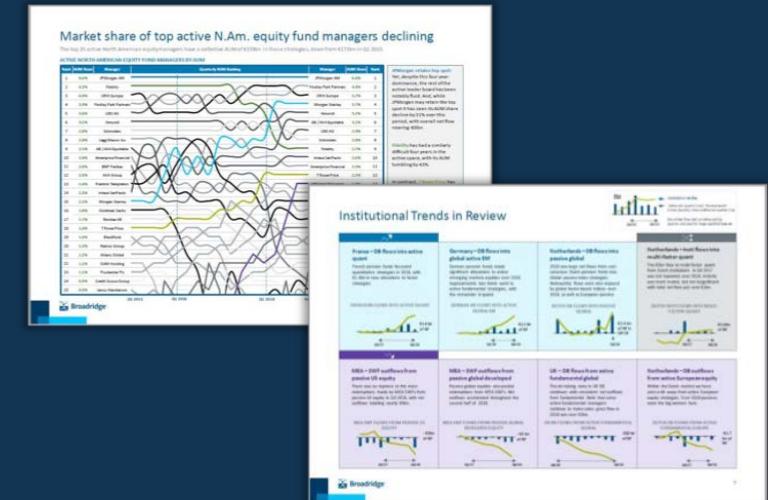
Global private
markets
● ●

Equities
● ●

Fixed income
● ●

Multi asset and
solutions
● ●

Flexible – pick your eight special topics



	European Prism		Global Prism	
	EQUITIES	FIXED INCOME	MULTI-ASSET AND SOLUTIONS	PRIVATE MARKETS
Annual topics Covered annually	Thematic Equities	Multi-Sector Fixed Income	Risk ranges / Model portfolios	Private Debt – Direct Lending
	Global Active	High Yield	Diversified Growth Funds	Infrastructure – Debt
	Factor Equities	Emerging Market Debt	Multi-Asset Income	Private Equity – Buyout
	Emerging Market Equities	Factor Fixed Income	Factor Multi-Asset	Infrastructure Equity
	APAC Equities	Responsible Fixed Income	Flexible Multi-Asset	Private Real Estate
	ETFs	Corporate Investment Grade	Absolute Return Multi-Asset	Private Debt – Other
			Responsible Multi-Asset	Private Equity – Early stage / VC
				Private Capital Solutions
Semi-annual topics Every 18 months	European Equities	Absolute Return Fixed Income	Balanced Multi-Asset	
	US Equities	Buy & Maintain	Target date	
	Absolute Return Equities	ETFs		
	Small Cap	US Fixed Income		
		Structured Finance		
		Asian Fixed Income		

distribution 360

CHANNEL DYNAMICS

Distribution 360 (D360) provides guidance for market entry or growth opportunities across existing and emerging asset pools.

D360 consists of quarterly regional reports designed to support business-strategy planning for achievable growth in multiple complex European and Asian markets.

D360's Europe and APAC reports include a data file that supports analysis; including unique data-measuring pools of assets that are accessible to third-party groups, as well as distribution channel metrics.

PACKAGE OPTIONS:

APAC

Europe



Navigator

CHANNEL DYNAMICS

Navigator is an annual service designed to form the foundation of your business planning to facilitate growth in key institutional markets.

From projections on revenues and assets, to granular product analysis, and fee intelligence; as well as detailed routes to market, Navigator is your complete intelligence solution for an institutional segment.

The service includes four hours of ‘on-call’ consulting time and is delivered through a report and an in-person workshop structured around an agenda of your choice.

PACKAGE OPTIONS:

APAC institutional
client opportunities

China

UK DC pensions &
retirement income



Independent research and expert analytics provide leading insights into the global asset management industry

A UNIQUE VANTAGE POINT

Utilise the best data

Assets, flows, and fees for retail and institutional globally – GMI.

Understand your clients

1,000s of fund selector and asset owner interviews per year to add qualitative understanding.

Tapping a wide knowledge pool

Country, regional, and global experts on a wide range of topics such as European distribution, China, and ESG.

A GLOBAL TEAM OF OVER 30 EXPERTS

Europe



Will Mayne



Chris Chancellor



Barbara Wall

Asia



Yoon Ng



Evonne Gan



Bryan Liu

Americas



Andrew Guillette



Jag Alexeyev



Jeff Tjornehoj

Design a bespoke programme for your unique needs

INSIGHTS SERVICES

Our global Insights business provides a comprehensive suite of annual services designed to help you grow through top quality information and expert insights.

All services can be selected as a standalone subscription, or combined to form a multi-report and/or multi-year discounted package.

Our recommended approach is our ‘Tailored Programme’.

	Trend Analysis	Product Demand	Channel Dynamics
Europe	Radar Europe	PRISM European Equity PRISM European Fixed Income PRISM European Multi Asset	Navigator UK DC & Retirement Income D360 Europe
APAC	Radar APAC		Navigator China D360 APAC
Americas	Radar US Radar LATAM		Models US
Global		Product Innovation Perspectives PRISM Private Markets	

A TAILORED PROGRAMME

We want to work with you for the long term, but we understand that your business priorities will change and that this sometimes makes multi-year package commitments difficult.

That is why we developed our tailored Insights programme. It offers our best rates while preserving flexibility to choose the right services for you each year.

EXAMPLE – A 2 YEAR, 4 SERVICE TAILORED PROGRAMME

Each year, pick any 4 reports from our global insights line up. Make a 2 year commitment and we will offer you our best discounts – in this example, 7.5% in year 1, and 5% in year 2. Get in touch for a programme that meets your needs.

YEAR 1	YEAR 2
Radar Europe	Radar LATAM
PRISM European Equity	Models US
Navigator China	PRISM European Fixed Income
Radar US	D360 Europe

Pick any four reports each year – and get the best discounts

Enhance your business decision making with our Insights

Utilise our knowledge and expertise to add an independent third-party view to your thinking.

Analytics

Insights

Advisory



Broadridge, a global Fintech leader with over \$4.5 billion in revenues, provides the critical infrastructure that powers investing, corporate governance and communications to enable better financial lives. We deliver technology-driven solutions that drive business transformation for our clients and help them get ahead of today's challenges to capitalize on what's next.

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Ready for Next