

# Market Analytics

## Powerful Market Data and Analytics for Asset Managers: Industry Flows and AUM Identify New Opportunities, Drive More Powerful Analytics and Insights

- RIA
- Broker-Dealer
- Bank
- Market Share
- Model Portfolios
- ETFs
- Mutual Funds
- Closed End Funds
- Active vs. Passive
- Model Classification
- Active Non- and Semi-Transparent ETFs

### KNOW YOUR COMPETITION, IDENTIFY YOUR BEST PROSPECTS

- Monthly access to the most comprehensive view of Mutual Fund and ETF assets and flows in the industry
- Prospect future clients by channel, firm and branch office location
- Monitor your market share by Morningstar Category or custom competitive peer group baskets, with filtering for model portfolio business
- Utilize leading-edge, customizable analytics to visualize and identify opportunities
- Spend more time selling and servicing clients versus manipulating data

### BROAD INDUSTRY DATA AND ANALYTICS TOOLS TO GROW YOUR BUSINESS

Asset managers need powerful information to navigate the challenges of volatile investment markets, unprecedented regulatory changes and transformational shifts in investors' product preferences. Leveraging Broadridge's unparalleled Market Intelligence data set — fund and ETF data for all retail and institutional third-party distribution channels — Broadridge Market Analytics delivers an exceptional view of mutual fund and ETF industry flows sold through RIAs, IBDs, wirehouse firms and banks. With one central source, finding, viewing, and understanding trends and opportunities is easier than ever, empowering your firm to make better decisions on product development, marketing and sales.

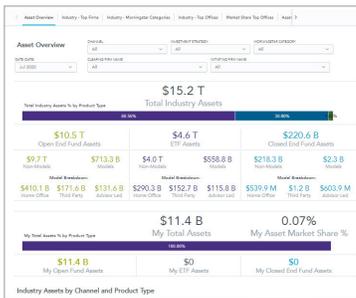
Access gold-standard industry data across all distribution channels to understand the competitive landscape for long-term funds and ETFs, and have a business-focused view of your assets and net flows compared with your direct competitors.

- Customize peer group comparisons to benchmark your funds against competitors
- View net flows by distribution firm and office location to measure success
- Identify new opportunities by investment category and channel

### HIT THE GROUND RUNNING WITH SOLID STRATEGIES BASED ON ROLLING TWO YEARS OF INDUSTRY HISTORY

This highly flexible platform is a powerful data-mining and analytics tool from day one — with no technical support required. At implementation, the platform is loaded with a two-year rolling history so you can perform analytics immediately. Powerful and mobile-ready, Market Analytics gives you and your team:

- A broad array of Mutual Fund and ETF data, which enables your firm to better position your products against competitors, create targeted marketing programs, and improve sales and retention strategies across key distribution channels.
- The ability to analyze and perform detailed reporting and charting across all channels.
- Access to reports and dashboards that provide multiple levels of data that can be scheduled and emailed directly.



## MARKET ANALYTICS OVERVIEW DASHBOARD

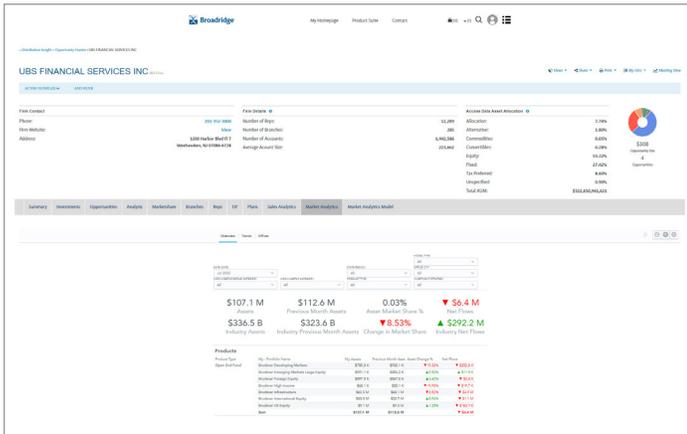
Market Analytics has access to multiple investment types and channels. The product can include up to a 24-month rolling history of assets on one platform. Track your market share versus your competitors. Access trends on AUM and Flows. Quickly identify potential opportunities at the distributor and branch office level.

## MODEL PORTFOLIOS



Identify channels, firms, and offices with high concentrations of model portfolio activity classified as Home Office, Third Party, or Advisor Led. Calculate market share by office and category with model portfolio assets filtered out. Focus National Accounts and Wholesaling resources appropriately.

## CLIENT ANALYTICS DASHBOARD



Client-focused dashboards let you view assets under management and net flows by product, category and peer group. Firm and office level dashboards include trending and market share.

## PLATFORM FLEXIBILITY — DISTRIBUTION INSIGHT

Market Analytics is a module within the Distribution Insight platform that enables clients to view market share by Morningstar Categories and Custom Peer Groups to focus on their direct competitors. Market Analytics can be filtered by channel and product type, including Mutual Funds, ETFs and Closed End Funds. Enhanced filtering is also available when clients utilize the platform's Model Portfolios module in conjunction with Market Analytics.

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## Don't miss a single opportunity

Explore the full suite of solutions on our Distribution Insight Platform. Sign in or register today at [distributioninsight.broadridge.com](https://distributioninsight.broadridge.com)

Schedule a demo or request a complimentary analysis of your fund's opportunities today. Call Fred Kosanovic at +1 412 201 6084 or email [fred.kosanovic@broadridge.com](mailto:fred.kosanovic@broadridge.com).

Broadridge, a global Fintech leader with over \$4.5 billion in revenues and part of the S&P 500® Index, provides communications, technology, data and intelligence. We help drive business transformation for our clients with solutions for enriching client engagement, navigating risk, optimizing efficiency and generating revenue growth.

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