

Success Optimizer for Mutual Funds and ETFs

Powerful analytics into the five key drivers of fund success.

Take the guesswork out of evaluating and improving the business side of your funds. With Success Optimizer, you can harness the power of exclusive data and analytics for deeper insights into the key drivers of fund success: price, performance, allocation, demographics and channel.

Focus your efforts. Optimize your impact.

Learn where your sales, marketing and distribution resources can drive the biggest benefit to your funds flow and your bottom line.

Look beyond returns and ratings.

Benchmark against peers for richer comparisons on price, allocations, demographics, channels and performance.

Discover where differences matter most.

Uncover the causes of inflows and outflows, with a broader view of factors than internal data can provide.

Gain unparalleled business insights.

Leverage proprietary and third-party data sets to strategize for existing funds and develop new products. Powerful predictive analytics offer a view of what's next.

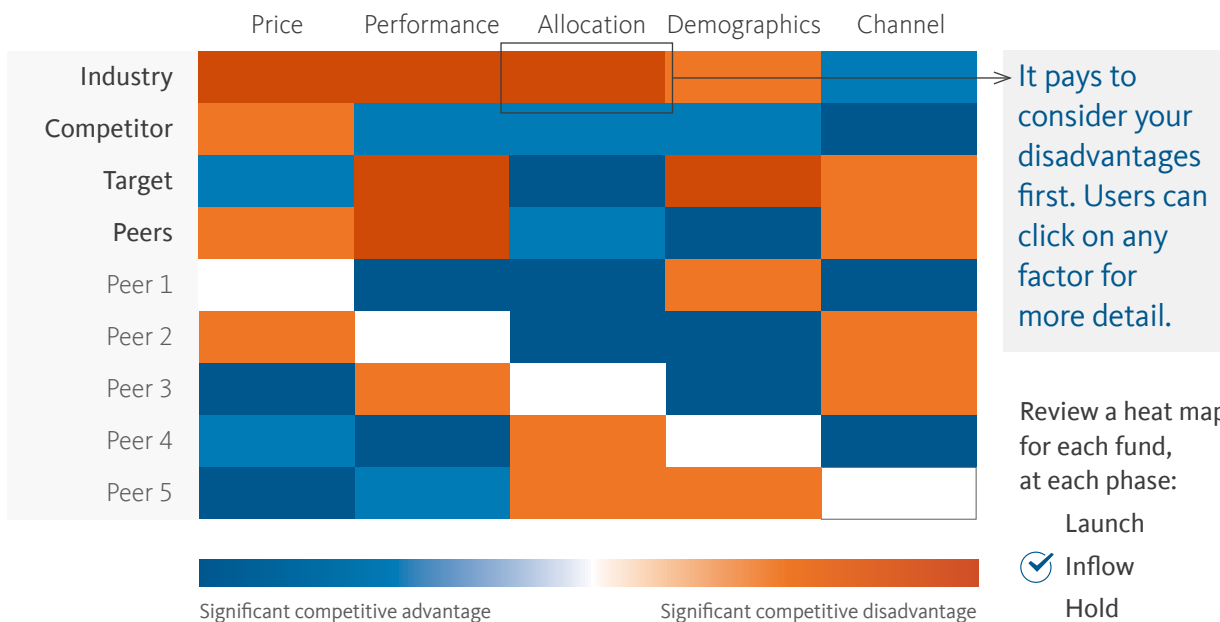
Broadridge makes it fast and easy.

Our proprietary platform makes it simple to identify, weigh, test and monitor key success factors to optimize the business side of fund management.

Money on the move. Money at rest.

Success Optimizer evaluates the degree of influence each factor has on the velocity and extent of asset flows, identifying the combinations of factors likely to put money on the move at each stage. Knowing how your fund stacks up factor by factor for up to ten competitors helps set your priorities.

Optimization opportunities: ABC Growth Fund vs. peers



Why do wealth managers choose this fund and not that one?

All other things being equal, wealth managers will look to performance when choosing funds. But in truth, fund selection may be driven by any of five key factors. Understand these and the impact on your funds so you can align fund flows more effectively to business objectives. Success Optimizer makes it easy.

ACCESS INSIGHTS THAT MATTER.

- Expenses by product and channel
- Asset allocation for models and by channel
- Intermediary and investor demographics
- Distribution by channel
- Peer performance within each channel

DEPLOY SWIFTLY. UTILIZE WITH CONFIDENCE.

- Full client support for rapid implementation.
- Proprietary data set comprising \$14T in intermediary assets.
- Proven algorithms for insights you can rely on.
- Easy-to-use dashboards put findings at your fingertips.
- Custom “what-if” scenarios let you assess the impact of various options.
- Broadridge subject matter experts on call.

Optimize your funds for success.

LEARN MORE:

For more information, email Fred.Kosanovic@Broadridge.com or call +1 866 359 0456

Unpack the drivers behind investor decisions

Our analytics leverage Form CRS (customer relationship summaries) and shelf monitoring systems to provide you with a best-interest perspective on investor buys, sells and holds.

Success Optimizer Ecosystem

