Broadridge®

FBF Intelligence

Amplifying the voice of fund selectors

FBF Intelligence is an independent competitor research platform which captures the voice and views of more than 1,000 of the most influential third-party fund selectors in Europe and APAC. The platform delivers unique insights into buyers' preferences and thoughts on individual asset managers and trends shaping the industry. From manager selection criteria through to measurement of core business functions and drivers of industry change, FBF Intelligence offers a deep understanding of buyer behaviour, manager perceptions and performance improvement recommendations.

Develop your competitive advantage by:

- Tracking your performance and knowing how well you are performing by country and distribution channel.

- Assessing brand awareness, positioning and engagement across markets and distribution channels.

- Understanding where you need to improve to compete better.

- See, and respond, to your competitors' weaknesses and strengths.

- Knowing who selectors perceive to be the best in class and reasons why.

- Understanding selectors' behaviour and views to inform your product, market and sales strategies.

"I would welcome more frequent roadshows and seminars on investment outlooks. These events need not take place physically but could be organised via webinars. Personally speaking, I am more interested in macro-economic themes than very detailed micro-economic ones."

SWITZERLAND – DISCRETIONARY PORTFOLIO MANAGER
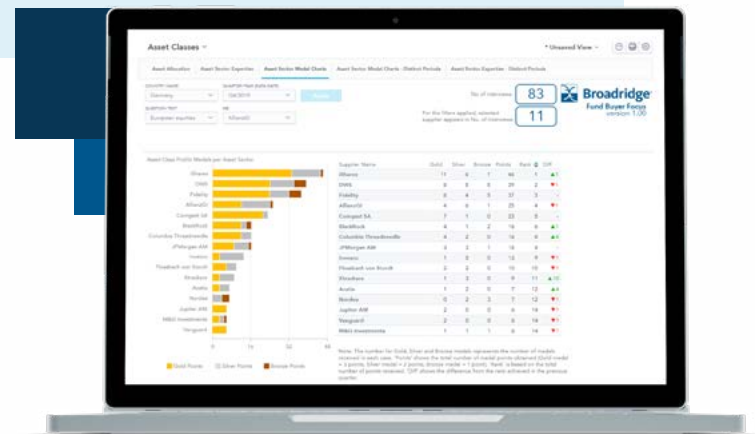
Performance measurement and competitive positioning

See the full picture of your performance by drilling down into the detail by country and distribution channel over different time periods.

How well is your business positioned for the future?

Key performance indicators

Business prospects

Fund buyers' voice

BRAND MANAGEMENT

- Brand awareness trends
- 10 brand image attributes and peer rankings

PRODUCT QUALITY

- Manager rankings
- Seven attributes measured
- Comparison to best in class and peer group comparisons

MARKETING AND COMMUNICATIONS

- Manager rankings
- Five attributes measured
- Comparison to best in class and peer group comparisons

PROVIDER SELECTION

- Criteria for provider selection
- Most used sectors
- Segment data by country and distribution channel

SALES & ACCOUNT MANAGEMENT

- Manager rankings
- Five attributes measured
- Comparison to best in class and peer group comparisons

ASSET ALLOCATION

- Current allocation and future intentions
- Managers most associated with sector expertise

BUSINESS GROWTH

- Rankings of asset managers most likely to receive more business from buyers
- Segment data by country and distribution channel

NEW PROVIDER OF CHOICE

- Rankings of asset managers most likely to receive new business from buyers
- Segment data by country and distribution channel

REDUCTION IN BUSINESS

- Rankings of asset managers most likely to suffer a reduction in business flows
- Reasons for reductions

NAMED MANAGER COMMENTS

- Access and review comments associated with your business and peers

INDUSTRY TRENDS AND CHANGE DRIVERS

- Understand what fund buyers are thinking and how they might respond
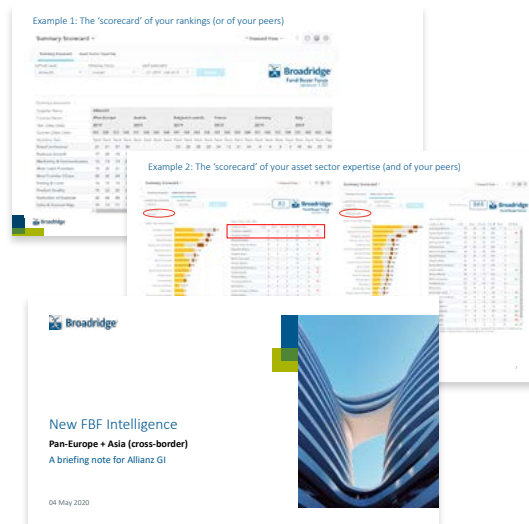
PRODUCT IMPROVEMENT NEEDS

- Hear first-hand what product and servicing improvements selectors would like to see

A customised service

Our team of researchers and analysts conduct interviews monthly in ten European markets and four Asian markets. Data is updated quarterly, providing subscribers with immediate access to the most comprehensive dataset of fund buyers' perceptions and behaviour.

What's included in an FBF Intelligence subscription?

- Unrestricted access to FBF Intelligence and datasets.
- Scorecards of key performance indicators relative to competitors.
- Quarterly discussions.
- Downloadable dashboards and raw data.
- Access to analyst support.

Example 1: The 'scorecard' of your rankings (or of your peers)

Example 2: The 'scorecard' of your asset sector expertise (and of your peers)

Broadridge

New FBF Intelligence
Pan-Europe + Asia (cross-border)
A briefing note for Allianz GI

04 May 2020

If you want to sharpen your competitive advantage, contact us at insights@broadridge.com to schedule a demo.

Why FBF Intelligence?

A LOOK AT THE NUMBERS:

The voice of third-party AUM

Comprehensive data and insights from the most influential fund buyers

12+ dashboards

Critical performance trends updated quarterly to inform management reporting

1,000+ interviews

Access quantitative and qualitative data from more than 1,000 in-depth interviews in a monthly cycle

3 years of data

Access historical data to identify performance trends

12,000+ comments

Listen and learn from the voice of your most influential customers

Ready for Next