

STYLE ANALYTICS

PART OF CONFLUENCE

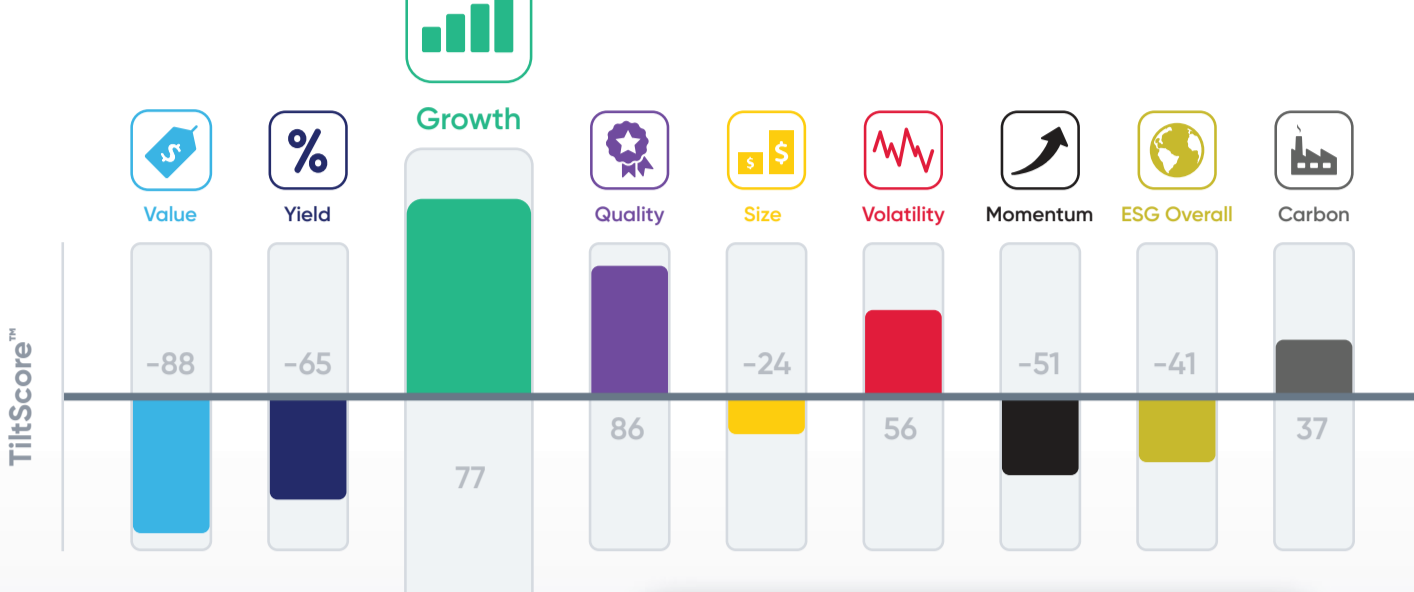
5 ways to win RFPs

Differentiate your fund and impress Asset Owners

Asset owners frequently depend on formal RFPs for manager selection. They seek independent validation of your investment approach and a user-friendly method for visualizing your fund's performance and risk. When it comes to showcasing your investment process, be it Fundamental or Quantitative, including your Portfolio Characteristics, here are five methods to illustrate why your fund is the ideal choice.

1 Demonstrate your active and consistent investment style.

Show your potential clients that you can tailor your portfolios to their specific goals and preferences. Demonstrate how your portfolios align with their desired style factors, such as Value, Growth, Quality, Size, or a combination of these and other factors.



TIP 1 SHOW YOUR STYLE TILTS™ WITH INDEPENDENT VALIDATION



Simplify the complex. Visualization tools such as the industry-standard Style Skyline™ and the Master Style Skyline™, provide objective independent validations of your fund's unique active investment style. Highlight how you stand out from others by analyzing more than 130 factors related to Fundamentals and ESG.

2 Showcase your historical performance and ability to generate alpha.

Every asset owner aims to surpass benchmarks in both favorable and unfavorable market conditions. To secure success in the RFP process, you must articulate your track record of generating alpha and provide transparent evidence of returns resulting from your strategic and tactical allocations or stock selections.



TIP 2 BREAK DOWN YOUR PERFORMANCE IN A COMPELLING VISUAL WAY

Illustrate performance related to both your equity factor allocation and stock selection with Style Mine, our factor performance attribution module.

3 Spotlight Your ESG Capabilities.

Increasingly, asset owners are placing a growing emphasis on ESG investing, sustainability, and reducing carbon footprints. Many aim to eliminate investments that do not align with their fundamental principles. ESG profiles frequently play a central role in their decision-making process and are a significant driving factor in their choice of investment managers.

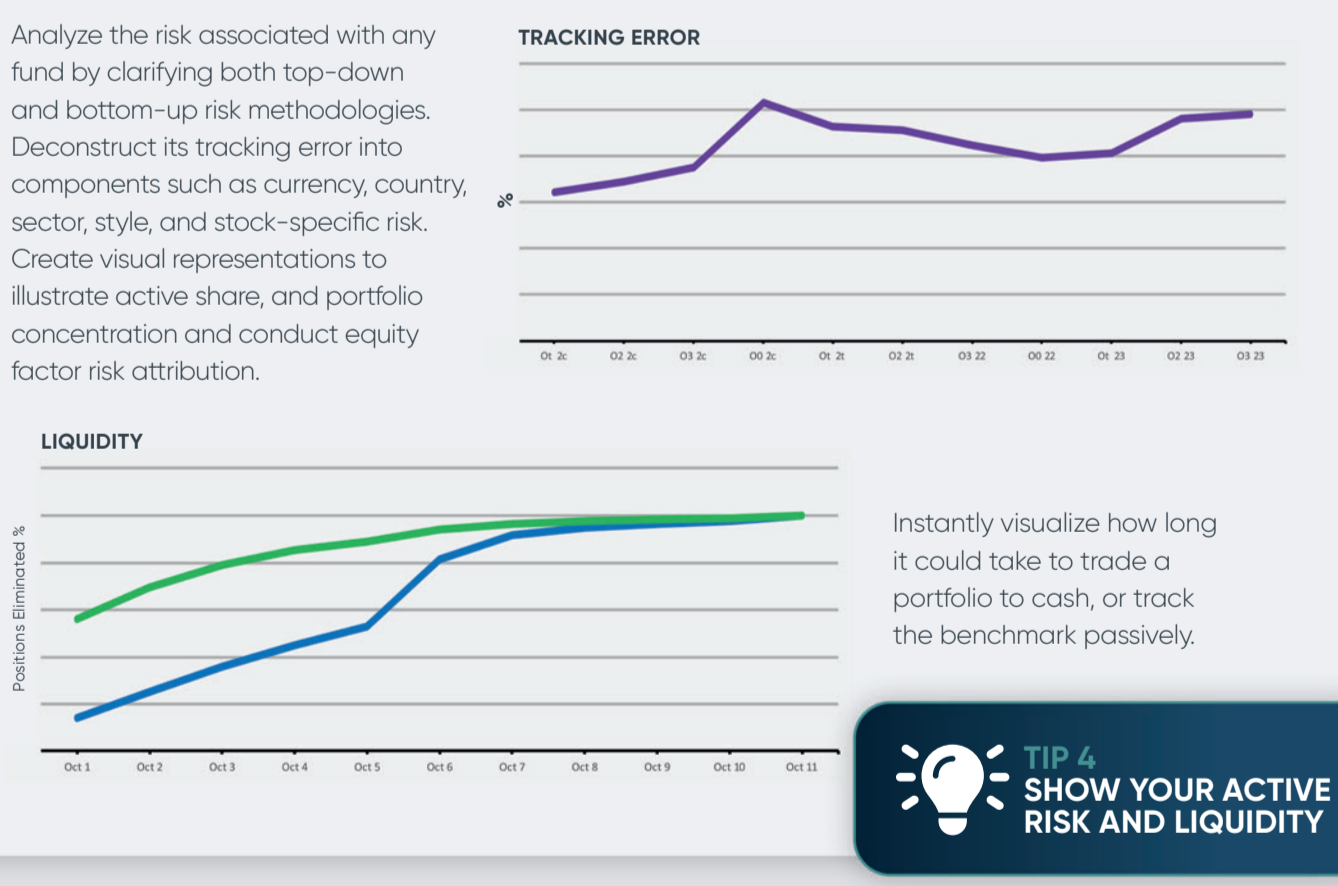


Leveraging aggregated data from MSCI, ISS, Sustainalytics, and TruCost, you can present a concise and all-encompassing overview of your fund's ESG (Environmental, Social, and Governance) exposures, complete with specific information about a portfolio's carbon footprint.

TIP 3 BRING YOUR ESG PROFILE TO LIFE

4 Present your risk and liquidity profiles.

Asset owners seek managers with the ability to adeptly handle risk and uphold liquidity within predefined parameters, particularly during periods of market turbulence.



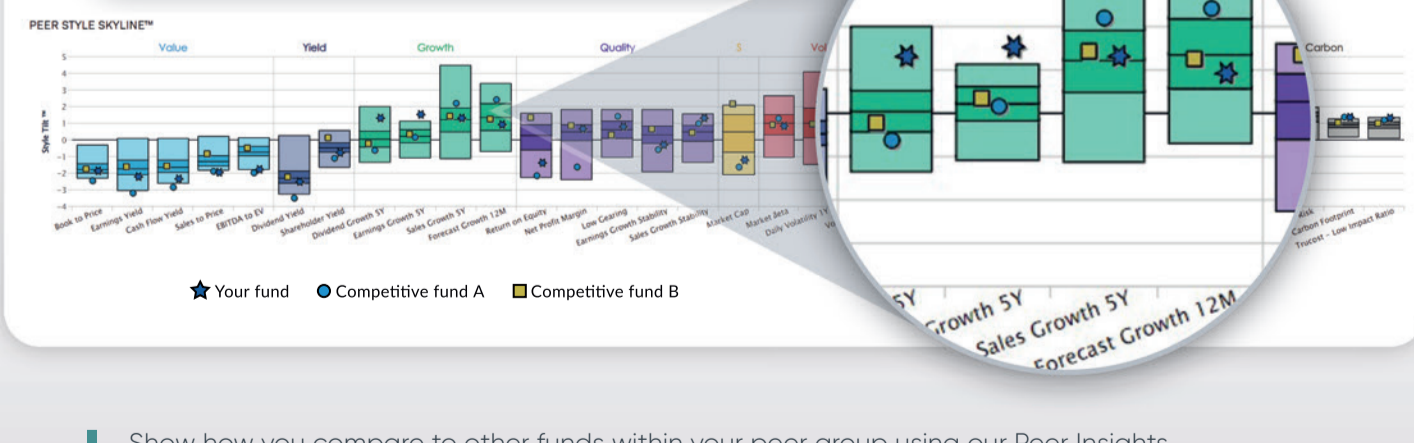
Instantly visualize how long it could take to trade a portfolio to cash, or track the benchmark passively.

TIP 4 SHOW YOUR ACTIVE RISK AND LIQUIDITY

5 Differentiate your fund

Shine in RFPs and competitive evaluations. Demonstrate how your fund compares to other selected funds. Offer crucial factors and alignment with pricing factors.

TIP 5 SHOWCASE YOUR UNIQUE STYLE AND FACTOR EXPOSURES AGAINST PEERS



Show how you compare to other funds within your peer group using our Peer Insights, offering factor transparency into a universe of competing funds.

Win more business with better more visually appealing RFPs

More than 50% of the top asset managers rely on Style Analytics solutions to share accurate, independent analysis of the investment process and portfolio characteristics requested in today's RFPs.

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