

Confluence® Style Analytics

Unique and Powerful Fund of Fund Analysis Capabilities for Asset Owners

Industry leading visually compelling portfolio insights for the asset management industry.

137
factors

134
countries

60,000
securities

28,000
funds

Style Analytics - Style Skyline™ ➔

Visually compare your fund's factor exposures to its benchmark.



Diversify, differentiate, and improve your portfolio strategy



Visualize your portfolio's factor exposures with our industry-leading Style Skyline™.



Access 28,000+ funds with pre-calculated factor exposures to compare and identify similar or competing funds.



Demonstrate and validate style consistency and alpha generation through an independent factor lens with 137 factors.



Differentiate your factor profiles for effective investor communications.



Unpack the how and why of factor exposure shifts and simulate rebalancing choices.

Powerful modules deliver the factor analyses you require

Differentiate your strategies with Portfolio Analyzer



- ▶ Uncover your factor exposure, performance attribution, liquidity and risk.
- ▶ Customize your Style Skyline™ to show the factor exposures supporting your unique story.

Assess your ESG exposure and risk with ESG Analytics



- ▶ Save valuable time with ESG analysis at the portfolio, sector, region, security, and fund of funds level and identify problematic and risky ESG investment areas.
- ▶ Determine the impacts of trading decisions, verify the limits on the Carbon Intensity metric, and measure and compare a portfolio's sustainability using MSCI SDG scores.

Compare your funds to your peers with Peer Insights™



- ▶ Gain competitive insights through fund comparison.
- ▶ Access unparalleled factor exposure data, pre-calculated across 28,000+ funds.

Build better portfolios faster with Similyzer™



- ▶ Search for similar and different funds, funds that naturally hedge your portfolio, and filter on virtually any variable of interest: factor, ESG, performance, and risks.
- ▶ Locate replacement funds and spot fund consolidation opportunities.

Identify the cause of style drifts with DeltaZoom™



- ▶ Instantly isolate and explain changes to factor exposures.
- ▶ Understand if changes are due to market movements or trading decisions at the security or sub-fund level within a fund of funds.

Propose optimal fund substitutions with Fund of Funds Studio



- ▶ Streamline comparisons with tools to select from peer groups, build a buy list, and perform factor analysis.
- ▶ Visually compare various sub-fund options to narrow your buy list.

Get market-based factor performance with Markets Analyzer



- ▶ Understand factor performance in your markets so you can evaluate your portfolios' style factor exposures and risk.
- ▶ Pinpoint market trends and instantly examine how equity markets behaved in different environments.

Better outcomes start here.

Let's discuss how market-leading factor analysis can enhance your value.

Schedule a demo today

confluence.com

