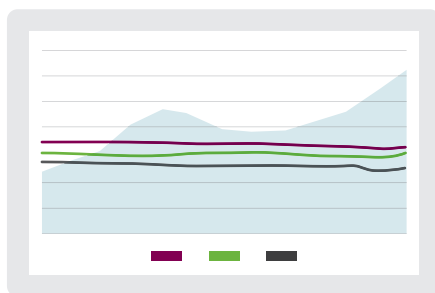


Know how you stack up with ADVANTAGE

Are your strategies top of mind with gatekeepers? Which firms are you really competing against? Is your consultant outreach effectively building interest in your products? You have hunches about these questions, but eVestment Advantage actually has answers. With data on the products consultants and investors are researching, comparing and charting, you can:

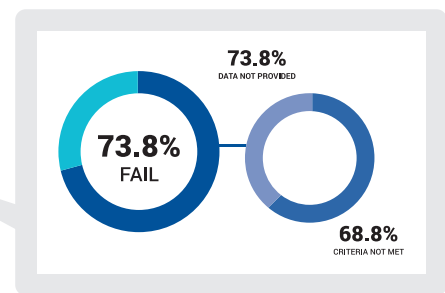
Measure your brand awareness over time



Know who consultants perceive to be your peers and how often you're compared against them



Analyze your screening pass-rate to understand whether you're providing the data consultants want



USE ADVANTAGE TO

Assess where your marketing and consultant relations efforts are working – and where they're not.

Effective roadshows, marketing campaigns and outreach should all increase interest in your strategies, as evidenced by the volume of research consultants conduct on your products. Use screening data in aggregate to gauge awareness of your brand, or track screening activity at the daily or weekly level to assess whether specific sales and marketing tactics are paying off.

Know who your peers actually are.

Use perceived-peer data in Advantage to understand who consultants and investors regard as your peers, then take a deeper dive into eVestment Analytics to find your competitive edge.

Fine-tune your pitch decks with the data consultants and investors care about.

Understand the metrics and thresholds consultants and investors use to evaluate products like yours, and incorporate these highly salient data points in your pitch books.

Geographically locate interest in your strategies.

Identify the regions where interest in your products is growing to align your sales, marketing and consultant relations efforts in those locations.

Gain an advantage with competitive intelligence from eVestment:

solutions@evestment.com

The power of ADVANTAGE

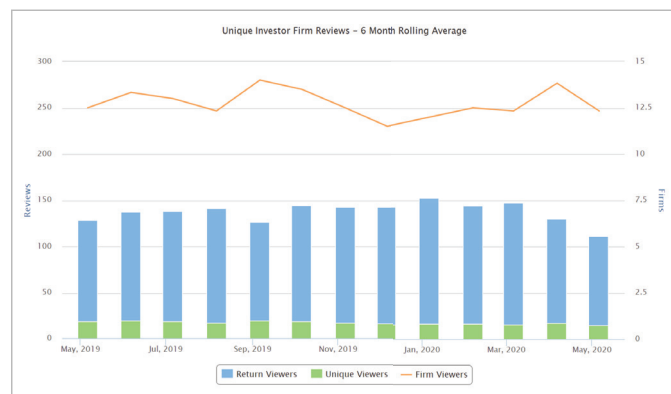
Technical Brief

eVestment Advantage provides transparency into how often managers are viewed, screened, charted and analyzed by consultants and institutional investors. This screening or viewership activity is an important early indicator of asset movement in the future, as asset owners and allocators conduct more screens before replacing managers or hiring new ones. At the product level, Advantage provides visibility into not just the number of screens that have included the strategy, but also that strategy's screening pass-rate. Advantage further segments failed screens by reason: For failing to meet criteria or for missing data. The data points consultants and investors use in their screens, along with the value thresholds they set, are also surfaced.

Capabilities

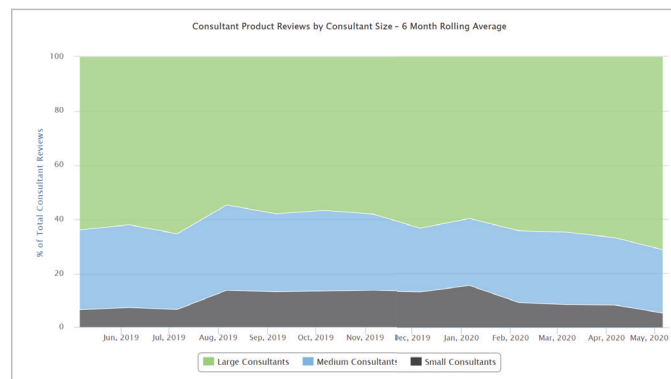
Product Viewership

See how specific products are being viewed by investors, consultants or both over time. Unique Views surfaces the number of unique analysts and firms that are reviewing the selected product in a given month, as opposed to return viewers.



Segment Consultant Interest

A breakdown of product views by consultant size helps quantify the level of interest the product is receiving from consultants, without naming specific firms. This helps Consultant Relations and Marketing teams assess whether their outreach efforts are generating greater interest in the product.



The power of ADVANTAGE

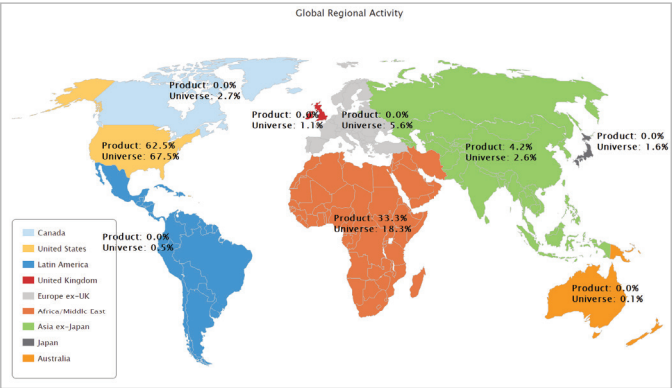
Products Ranked by Viewership

See how products rank, based on the number of profile views they receive from consultants and investors.

Vital Signs: Percentile Ranks				①
Percentile Rank Against	1 Year	3 Month	1 Month	
All Products	11	54	---	
US Large Cap Growth Equity	22	67	---	
All US Equity	23	65	---	

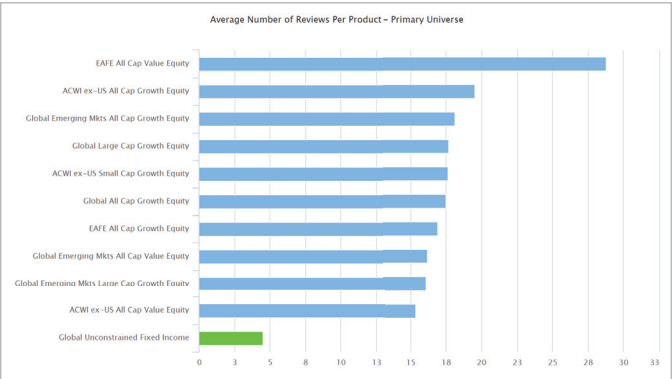
Viewership by Geography

See the domicile of investors and consultants viewing a selected product and compare to average views for all products in that universe.



Trending Products in a Universe

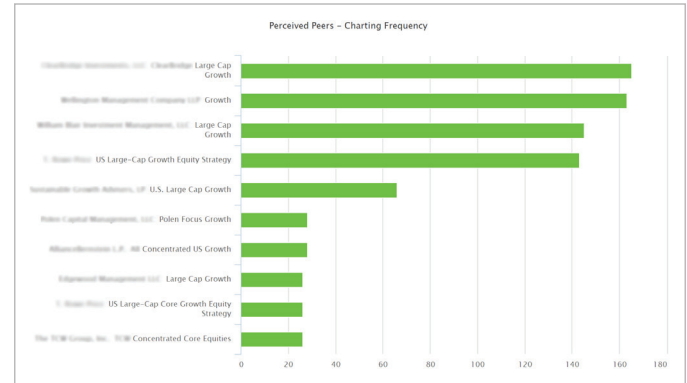
Select a product, then see the top 10 most-viewed products in that product's primary universe. This situates interest in the product relative to the most viewed products. And by tracking the top 10 most-viewed universes, you're seeing early indicators of the strategies consultants and investors are researching now for potential allocation changes in the future.



The power of ADVANTAGE

Perceived-Peer Groups

When consultants and investors create tables and charts to compare managers, Advantage tracks who is included in those comparisons. This provides clear line-of-sight into which products consultants and investors perceive to be peers.



Criteria Most Frequently Used to Compare Managers

Advantage tracks the screening criteria and value thresholds consultants and investors use most often to compare managers. Criteria can be very different universe to universe, revealing the metrics and data points asset owners and allocators perceive to be important when they screen managers.

Screening Criteria				
Rank	Fundamental Large Cap Growth	Total	US Large Cap Growth Equity	Total
1	Performance: Performance: Returns	643	Performance: Performance: Returns	444,816
2	Firm: AUM & Accounts: Total AUM	256	Firm: AUM & Accounts: Total AUM	120,699
3	Product: Product Profile: Preferred Benchmark	246	Product: AUM & Accounts: Total AUM	105,615
4	Product: AUM & Accounts: Total AUM	234	Performance: Returns: MRQ	87,821
5	Product: Product Profile: Primary Investment Approach	129	Product: Product Profile: Preferred Benchmark	86,980
6	Performance: Returns: MRQ	118	Product: Product Profile: eVestment Product ID	63,826
7	Product: Product Profile: eVestment Product ID	115	Product: Product Profile: Primary Investment Approach	53,412
8	Product: Product Profile: Portfolio Management Strategy	98	Product: Product Profile: Portfolio Management Strategy	40,507
9	Product: Product Profile: Geographic Region	94	Product: Product Profile: Asset Class	33,590
10	Firm: General Firm Info: Firm Legal Name	91	Product: Product Profile: Geographic Region	32,073
11	Product: Product Profile: Asset Class	84	Firm: General Firm Info: Firm Legal Name	31,067
12	Firm: General Firm Info: City	83	Firm: General Firm Info: eVestment Firm ID	30,952
13	Product: Product Profile: Product Name	82	Product: Vehicle Availability: Vehicle Category	29,370
14	Product: Vehicle Availability: Vehicle Category	66	Firm: General Firm Info: City	28,768
15	Performance: Returns: 5 Years	66	Product: Product Profile: Product Name	28,060
16	Performance: Excess Returns: 3 Years	58	Performance: Excess Returns: 3 Years	26,920
17	Product: Product Profile: Investment Focus	57	Product: Vehicle Availability: Legal Structure of Vehicle	26,396
18	Product: Product Profile: Primary Equity Style Emphasis	50	Product: Product Profile: Primary Equity Style Emphasis	23,845
19	Product: Vehicle Availability: Legal Structure of Vehicle	47	Performance: Returns: 5 Years	22,944
20	Performance: Excess Returns: Calendar Year	47	Product: Product Profile: Is this product a dedicated ESG strategy?	21,199

The power of ADVANTAGE

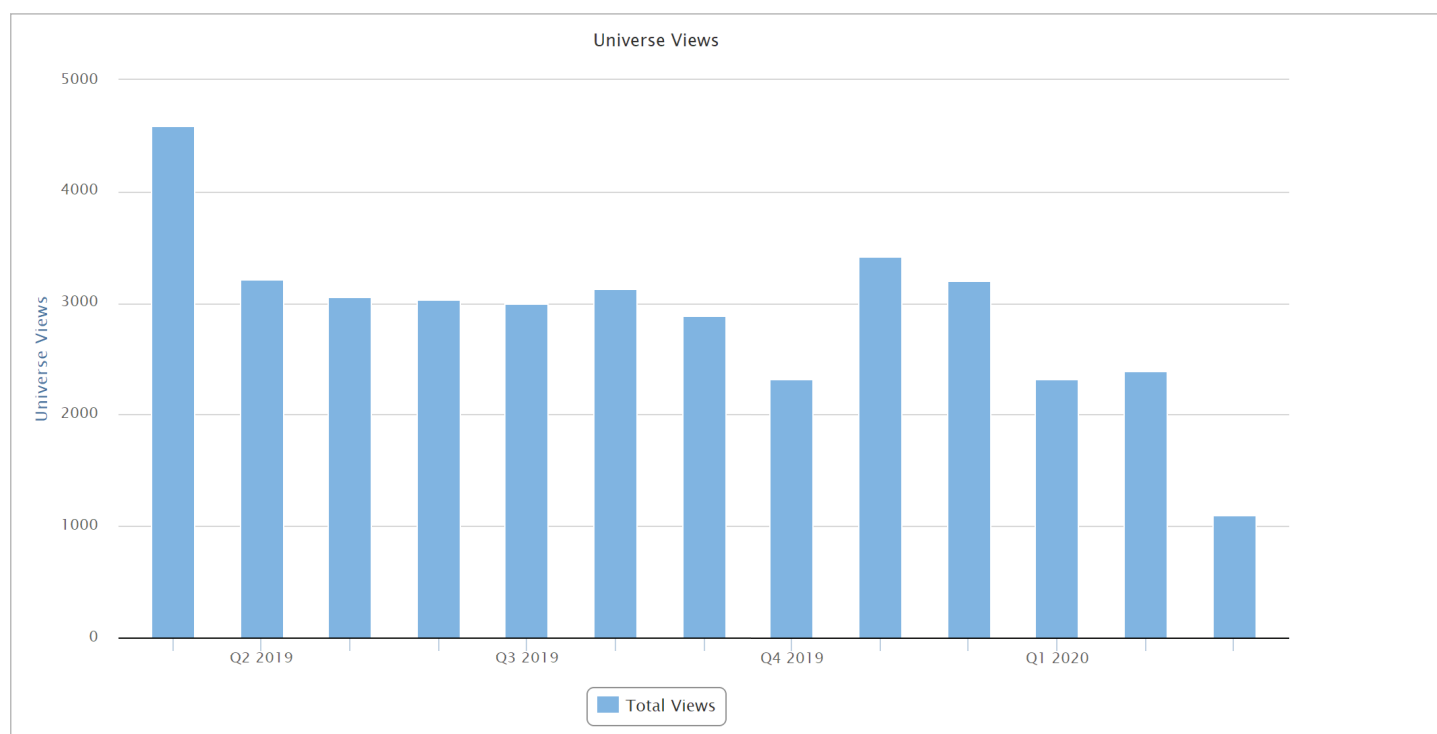
Universe Level Intelligence

With viewership data updated daily, track and analyze views on 715 universes across multiple time periods to understand which ones are gaining or losing momentum.

Filter universe views by regional location, type of client or show only the universes with your firm's products to gain a customized look of each universe you compete in.

Drill into any universe to see the total views, median product views and the top-viewed products in that universe, along with total viewership numbers, returns, and stated fees all ranked and exportable to Excel.

Universe (347)	Universe Views ①		Products
	Total ↓	Median Product	
US Large Cap Value Equity	12,431	12	424
Global Large Cap Core Equity	11,286	15	302
Global All Cap Core Equity	11,202	14	320
US Large Cap Growth Equity	10,792	12	335
US Small Cap Value Equity	9,112	20	258
Global All Cap Growth Equity	8,923	24	113
Global Emerging Mkts All Cap Core Equity	8,593	31	180
US Large Cap Core Equity	8,578	12	418
US High Yield Fixed Income	7,849	14	272
US Small Cap Growth Equity	6,831	22	190
US Core Fixed Income	6,557	11	264
US Small Cap Core Equity	6,452	13	213
Global All Cap Value Equity	5,591	19	127



Top-Viewed Products in the Universe									
Firm Name	Product Name	Views		3-Year Returns (Q1 2020)		1-Year Trailing Flows (Q1 2020)		\$50M Stated Fees	
		Total	Rank	Total	Rank	Total ↑	Rank	Total	Rank
Equity	Equity	1243	1	2.35%	13	---	---	60	70
Equity	Equity	1184	1	3.97%	6	---	---	78	94
U.S. Equity	U.S. Equity	1169	1	-1.91%	57	---	---	50	29
Large Cap	Large Cap	753	1	2.23%	15	---	---	72	90
Large Cap Value Equity (U.S.)	Large Cap Value Equity (U.S.)	746	1	-4.84%	85	---	---	55	51
Relative Value Equity	Relative Value Equity	577	1	3.83%	6	---	---	55	51
Large Cap Value Equity	Large Cap Value Equity	562	1	-2.38%	65	---	---	42	17
Large Cap - Absolute Value	Large Cap - Absolute Value	504	1	-4.34%	83	---	---	30	3