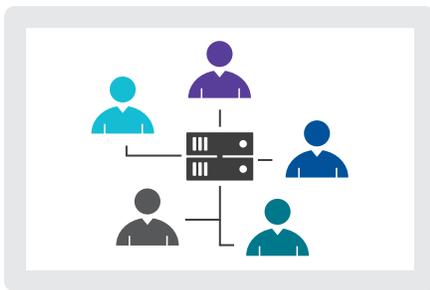


Scale your research with

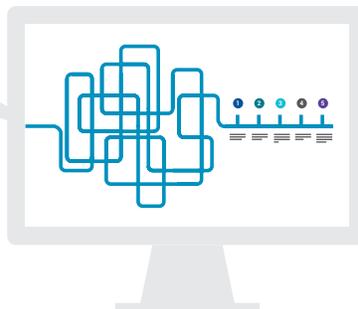
RESEARCH MANAGEMENT

Intensive manager research is central to what you do. Ensure that your research – from documents and notes to commentary and reviews – are centralized and secure with eVestment Research Management.

Centralize your firm's manager research assets



Bring efficiency to your research process with workflow triggers and reminders



Document your due-diligence methodology for your board or other stakeholders



USE RESEARCH MANAGEMENT TO

Centralize your manager research assets.

Findability sounds like a tech term, but it's actually a problem many research teams face everyday. They know they have deep research on a strategy or manager, but it's just not findable. It's hidden on a chaotic shared drive or dispersed across analysts.

Bring efficiency to your research process.

Your research team has a well defined due-diligence process for screening managers, but you're still relying on emails to remind people of review deadlines or pending approvals. Automated workflow frees you to do what you do best – research, analyze and think – and lets technology take care of reminders to Kevin.

Educate clients and stakeholders.

Increasingly, boards, families and other investor stakeholders want to more fully understand the process behind how particular managers have been chosen. With a purpose-built platform for manager research, it's easy to show your due-diligence process, step by step.

Step-up to **Investor Pro** because your tools should be as good as you are.

Research Management +

- The most influential database of institutional managers in the world
- Analytics tools for comparing and ranking managers and conducting what-if simulations
- A searchable document library with intelligence on the fees other investors are paying, consultant recommendations and thousands of manager ratings by other investors and consultants

Request a tour:

solutions@evestment.com

The power of RESEARCH MANAGEMENT

Technical Brief

eVestment Research Management is the only purpose-built research management platform designed for institutional manager research. Other RMS platforms are designed for investment research with the expensive functionality required to track individual securities, but eVestment Research Management is specifically designed for public pensions, corporate plans, endowments, foundations, family offices and other organizations that research money managers. Our RMS also integrates with eVestment data on 23,000+ institutional strategies from 3,400+ long-only and hedge fund managers worldwide.

Capabilities

Centralized Manager Research & Intelligence

Project and document libraries ensure all your information is in one place. Just drag-and-drop files to upload them to a library and link email correspondence with Outlook integration.

The screenshot displays the eVestment Research Management dashboard for a strategy named "Microcap Equity". The dashboard is organized into several key sections:

- STRATEGY:** Shows the strategy name "Microcap Equity", its status as "Approved", and a bar chart for "MRQ" (Monitoring Rules) across "YTD", "1 Yr", "3 Yrs", "5 Yrs", "7 Yrs", and "10 Yrs".
- ASSESSMENTS by As of Date:** A list of 21 assessments, including "Manager Recommendation" (2021, Sep 02), "Idea Generation", "Implementation", "Portfolio Construction", "Business Management", and "Impact", each with a confidence level (Average, High, or No Rank).
- DOCUMENTS by Name:** A list of 15 documents, including "Internal Analysis - Packet 6 Versions" (2020, Feb 18), "Internal Analysis - Quant Profile 32 Versions" (2020, Mar 26), "Internal Analysis - RFP 2 Versions" (2019, May 15), "Marketing - Factsheet 71 Versions" (2020, Apr 23), "Marketing - GIPS Performance 2 Versions" (2019, Apr 25), and "Marketing - Pitch Deck 1 Version" (2019, Feb 04).
- NOTES by As of Date:** A list of 39 notes, including "Onsite Review" (2019, Feb 14), "Research Note" (2019, Feb 14), "Performance Update" (2019, Feb 14), "ADV Review" (2019, Feb 12), "DD Checklist" (2019, Jan 25), "Research Note" (2019, Jan 17), and "Meeting Minutes" (2019, Jan 17).
- STRATEGIES by Name:** Shows 1 strategy named "Small Cap Value" with a "Subadvisor" field.
- COMPANIES by Name:** Shows 1 company with "4 Strategies, 7 Employees" and a "Parent Company" field.
- PEOPLE by Last Name:** Shows 5 people, including "Primary Lead Analyst", "Director of Research", and "Analyst".

At the bottom of the dashboard, there are buttons for "+ QUICK CREATE" and "+ REPORT AN ISSUE", and the "RESEARCH MANAGEMENT" logo.

The power of RESEARCH MANAGEMENT

Compliance Governance

eVestment RMS makes it easy for teams to adhere to compliance guidelines – every time. Ensure your disclosures are up-to-date and reports match your brand guidelines, with automated compliance monitoring, a due diligence calendar and packet builder.

The screenshot shows a dashboard with three main sections: 'ACTIVITY AND NOTES', 'MONITORING RULES', and 'CHECKLISTS'. The 'ACTIVITY AND NOTES' section displays a list of items with their completion status and dates. The 'MONITORING RULES' section shows a '5 Templates' and a '7 Entities' summary. The 'CHECKLISTS' section is titled 'APPROVED MANAGER' and shows a list of managers with their completion percentages and dates.

This screenshot provides a detailed view of a monitoring rule. On the left, a 'RULES' sidebar lists various rules with their frequencies and counts. The main area is titled '118 CALENDAR by Status' and shows a list of dates with corresponding actions and last interaction dates. Below the calendar, a detailed view of a 'Quarterly Performance Update' rule is shown, including its frequency, applicable status, and asset classes.

Track Activity

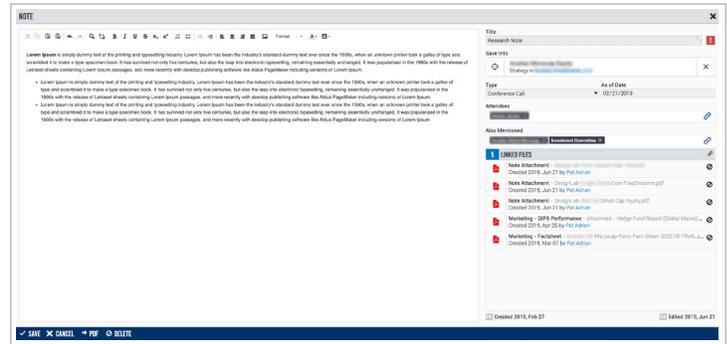
View and monitor the status of research and review activities across your firm. Instantly see your firm's approved manager list and manage your research pipeline using customized asset classes and factors. Automated tracking ensures you're able to document the firm's opinions and recommendations over time for better internal analysis and communication with stakeholders or clients.

The screenshot shows a dashboard with three main sections: 'ACTIVITY AND NOTES', 'MONITORING RULES', and 'CHECKLISTS'. The 'ACTIVITY AND NOTES' section displays a list of activities with their dates and times. The 'MONITORING RULES' section shows a '1034 ALL ACTIVITY' summary. The 'CHECKLISTS' section is titled '168 STRATEGY CHANGES' and shows a list of changes with their dates and times.

The power of RESEARCH MANAGEMENT

Capture Interactions

Use quick notes on your laptop or mobile device to capture meeting notes, attendees and documents related to the interaction. These artifacts are all searchable so you can find them quickly later.



Linked to eVestment data on 23,000+ strategies

Link managers to their eVestment profiles to always have the latest reported data on performance, risk, portfolio characteristics and more.

The screenshot displays the 'RESEARCH RESOURCES DASHBOARD' for 'MICROCAP EQUITY'. The dashboard includes a navigation sidebar on the left with sections like 'STRATEGY', 'DETAILS', 'ACTIVITY', 'ANALYTICS PROFILE', 'RELATED RESOURCES', 'LINKED RESOURCES', 'RESEARCH TRACKING', and '3RD PARTY PLATFORMS'. The main content area is titled 'ANALYTICS PROFILE' and shows the following data:

ANALYTICS PROFILE		ASSET CLASS	
Microcap Investments		Equity	
MICROCAP EQUITY			
As of Mar, 31			
GEOGRAPHY	United States	TOTAL PRODUCT AUM	\$467.7MM (-41.28%)
PRIMARY CAPITALIZATION	Micro Cap	PRODUCT INSTITUTIONAL AUM	\$467.7MM (-41.28%)
PRIMARY EQUITY STYLE	Core	TOTAL FIRM AUM	\$504.3MM (-40.33%)
PREFERRED BENCHMARK	Russell Microcap	PRIMARY UNIVERSE	eA US Micro Cap Core Equity
DEFAULT VEHICLE			

Key Product Updates
As of Mar, 31

- Microcap Equity is underperforming the Russell Microcap with a -0.86% 3-year excess return, falling into the 3rd quartile of the US Micro Cap Core Equity with a percentile rank of 62.
- Institutional AUM has decreased by 41.28% to \$468M since the past quarter.

Vehicle

Microcap Composite
Separate/Segregated Account in Microcap Equity

Annualized Returns
As of Mar, 31

Percentile	MRQ	YTD	1 Yr	3 Yrs	5 Yrs	7 Yrs	10 Yrs

Universe Rankings
As of Mar, 31

MRQ	YTD	1 Yr	3 Yrs	5 Yrs	7 Yrs	10 Yrs

At the bottom of the dashboard, there are buttons for '+ QUICK CREATE' and '+ REPORT AN ISSUE', and the 'RESEARCH MANAGEMENT' logo.