

SEE CLEARLY WITH FACTOR ANALYSIS

Independent analysis into markets, peers and portfolios.



Factors
are the
systematic
drivers of risk
and return
- time to
feature factor
analysis in
your process?

Can you
differentiate
and defend
your
investment
strategy
to attract
and retain
investors?

Can you
independently
validate a
manager's
investment
philosophy?

Using industry recognised, holdings based factor analytics

Gain the clearest insights into portfolios

Style Analytics is the provider of industry standard factor and portfolio analysis, delivering objective and independent insights into markets, peers and portfolios.

When it comes to investing, factors are becoming more sought after, with the reported allocation to factor strategies surpassing \$1.9 trillion; a trend which shows no signs of slowing down. Experts are predicting that this figure is set to almost double, reaching \$3.4 trillion by 2020.

This trend in using specific factors to access superior returns has seen an increase in complex fund structures and a plethora of new "factor based" funds for investors to decipher, and

investment managers to compete with. The result? Asset managers and asset owners alike, now need more transparency and innovative solutions to help interpret, monitor and differentiate products.

Although it seems that factor investing has only recently grown in popularity; factor investing and indeed factor analysis is not new. In fact, factors have been present in portfolios for decades and their original use dates back as far as the 1930's. Investors need to be aware that it is not just through these new multi-factor portfolios and ETFs that factor exposures can be achieved, it is also possible to gain such

exposures via traditional active and passive strategies.

These strategies possess their own factor biases, which can be hidden under the guise of a clever fund name, or an established investment philosophy. The best way to uncover true factor allocations regardless of strategy, is by using independent analysis.

Our independent factor analysis framework provides the right tools to help uncover and monitor factor exposures in an easy to interpret and accessible way. This gives investment professionals the transparency required to make superior investment decisions.



Can you clearly see which factors are driving market and portfolio performance?



Do you have transparency on the factor exposure of your funds' peer group?



Are you unknowingly taking on unexpected exposures and greater risk?

We have found the Style Research platform to be one of our most innovative third-party software providers. The Investment Team use it to identify style and risk drivers within their portfolios. Our Sales Team access valuable insight into our fund profiles. Marketing access attractive and dynamic reporting outputs, for client presentations and pitches.

J O Hambro Capital Management, £28.1B AUM

See Clearly. The Real Investment Story.

- Use independent factor analysis to reveal previously hidden insights and understand portfolio exposures across commonly recognised styles such as Value, Growth and Quality.
- Assess, connect and compare market, peer group and fund-specific perspectives.
- Present the clearest and most accurate investment story with quick-to-interpret graphics.

Get better results with a consistent factor-based framework across markets, peers and portfolios



A trusted partner to 280+ clients worldwide

Style Analytics facilitates effective collaboration and communication between fund managers, asset owners and consultants. Our analytics software is easy to use and enables our clients to communicate clearly no matter how complex the investment story.

The result? Objective analysis, better recommendations and winning portfolios

ASSET MANAGERS

Validate your investment strategy using objective analysis.

Create differentiation and gain transparency on your peer universe.

Build trust and communicate clearly with easy to interpret graphics.

ASSET OWNERS

Identify if funds are aligned with their investment strategy.

Take control and monitor portfolios in-house, with easy to use analysis.

Find the best fit for your mandate by comparing factor exposures between competing funds.

CONSULTANTS & ADVISORS

Confirm a managers investment philosophy using independent analysis.

Compare peer groups and competitors by revealing hidden exposures.

Create meaningful reports and carry out the most comprehensive due diligence.

About Style Analytics

Style Analytics is an independent, global software provider for investment professionals. We enable asset owners, consultants and asset managers to build objective and comprehensive factor analysis on markets, peers and portfolios.

By creating transparency through factor exposures - the systematic drivers of portfolio risk and return - we help investment professionals validate and make strong investment decisions.

Previously known as Style Research, Style Analytics has over 20 years' experience in factor analysis and serves over 280 investment institutions across 30 countries. Our breadth and depth of industry knowledge and expertise continues to bring superior tools and innovations to support our clients.

“We have been using Style Analytics for over ten years. Their team is top notch and the customer support is exceptional. We always reach a human who listens, understands what we are asking and ensures we are using the product to its fullest.”

Asset Owner, \$700M AUM



Global reach

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