

ONLY FOUND HERE

# Similyzer™

## Save Time and Money



A comprehensive holdings-based comparison tool for Asset Owners to build better portfolios faster. Similyzer tells you exactly how similar your selected fund is to all the other funds in our database of 42,000 global funds so you can choose the best one for your portfolio.

### Find **exactly** the right fund

Manager selection just got a whole lot faster and easier with our holdings-based Similyzer™ module.

Similyzer™ lets you:

- Finds precisely which funds match the characteristics that matter to you
- Quickly see just how similar or different funds are to each other based on factors of your choosing
- Identify your managers' closest proxies, scan for unintended exposures and compare performance
- Deeply understand exactly how funds are different across numerous attributes
- Find replacement funds that match the traits you want and filter on factors, ESG, performance, etc.

### Benefits for Asset Owners

Identify all the funds with the characteristics you care about

Find the best diversifying funds for your portfolio

Find replacement funds that match important exposures

Identify fund consolidation opportunities

Similyzer™ instantly tells you which funds are relevant to you based on the attributes you choose

Portfolio	Similarity Style Score	Performance Return							Risk		Active Share		
		Value	Yield	Growth	Quality	Size	Volatility	Momentum	1 Month	1 Year		Tracking Error	
<input checked="" type="checkbox"/> Columbia Mid Cap Growth Fund	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	1.78	35.16	4.7	89.62
<input type="checkbox"/> Azzad Ethical Fund	92.6	99.9	99.9	85.4	88.6	100.0	87.8	88.2	0.75	30.01	3.9	77.83	
<input type="checkbox"/> T. Rowe Price Diversified Mid Cap ...	90.6	97.9	75.0	94.3	88.1	99.4	86.8	95.2	1.75	37.90	3.2	59.38	
<input type="checkbox"/> Principle Midcap Growth Fund III	89.6	98.2	71.4	80.1	95.8	99.5	89.2	97.0	1.55	34.97	3.5	71.14	
<input type="checkbox"/> American Century US App Mid Cp Gr...	89.4	99.6	81.9	89.4	78.9	98.3	91.0	88.6	1.35	36.62	4.6	85.86	
<input type="checkbox"/> American Century Heritage Fund	89.4	99.6	81.8	89.6	78.8	98.3	91.1	88.3	1.39	35.52	4.6	85.86	
<input type="checkbox"/> American Century NT Heritage Fund	89.3	99.6	81.9	89.4	78.7	98.3	90.9	88.2	1.36	36.75	4.6	85.86	
<input type="checkbox"/> T. Rowe Price US Tax-Off Sm CO Gr E...	88.9	98.1	83.1	96.3	97.6	98.6	67.7	85.7	1.60	36.34	3.1	61.06	
<input type="checkbox"/> Rhumblin Russell Mid-Cap Growth...	88.2	96.4	86.5	87.6	81.5	99.1	81.7	86.2	1.17	35.40	3.5	51.49	
<input type="checkbox"/> Fidelity MidCap Groth ETF	88.1	96.4	86.3	87.5	81.3	99.1	81.5	86.0	1.16	-	3.3	51.67	
<input type="checkbox"/> iShares Russel Mid-Cap Growth ETF	88.1	96.4	86.2	87.5	81.2	99.1	81.5	86.0	1.16	35.14	3.5	51.54	
<input type="checkbox"/> JPMorgan Mid Cap Equity Fund	87.2	87.1	83.3	92.6	85.9	97.9	72.8	92.9	2.10	32.91	1.9	67.93	
<input type="checkbox"/> Federated MDT Mid Cap Growth	87.0	93.1	98.6	81.3	75.8	100.0	79.6	83.5	0.60	28.32	4.5	83.83	
<input type="checkbox"/> Federated MDT Mid Cap Growth Fund	86.8	93.3	98.7	81.1	75.3	100.0	79.5	83.3	0.56	27.95	4.3	83.93	
<input type="checkbox"/> Invesco Mid Cap Growth Fund	86.8	99.4	71.3	87.6	79.0	99.3	89.1	85.9	0.92	34.09	4.0	83.93	

While funds may be similar based on select factors, they can be very different viewed from others. Similyzer™ shows you all the comparisons so you can judge for yourself.



Value



Yield



Growth



Quality



Size



Volatility



Momentum



ESG



CARBON

GAIN YOUR FACTOR EDGE

## Key Benefits

### Over 42k Funds

Quickly search for similarities and differences among over 42,000 funds

### Identify The Funds

Identify which of your funds are effectively just duplicating another fund's exposure

### Gain Understanding

Gain a very focused understanding of how funds are similar and how they differ from one another

### Find Funds

Find funds that naturally hedge your portfolio

### Filter Funds

Filter similar funds on virtually any variable of interest: factor, ESG, performance, risk.

## Core search / filter capabilities

Similarity measured on any subset of our 130+ factors for all 42,000+ funds in eVestment and MorningStar databases

Similarity measured on latest data or over time

Compare similarity along with performance, active share, tracking error, beta and many other metrics

View similarity analysis at Master Skyline level and at individual sub-factor level

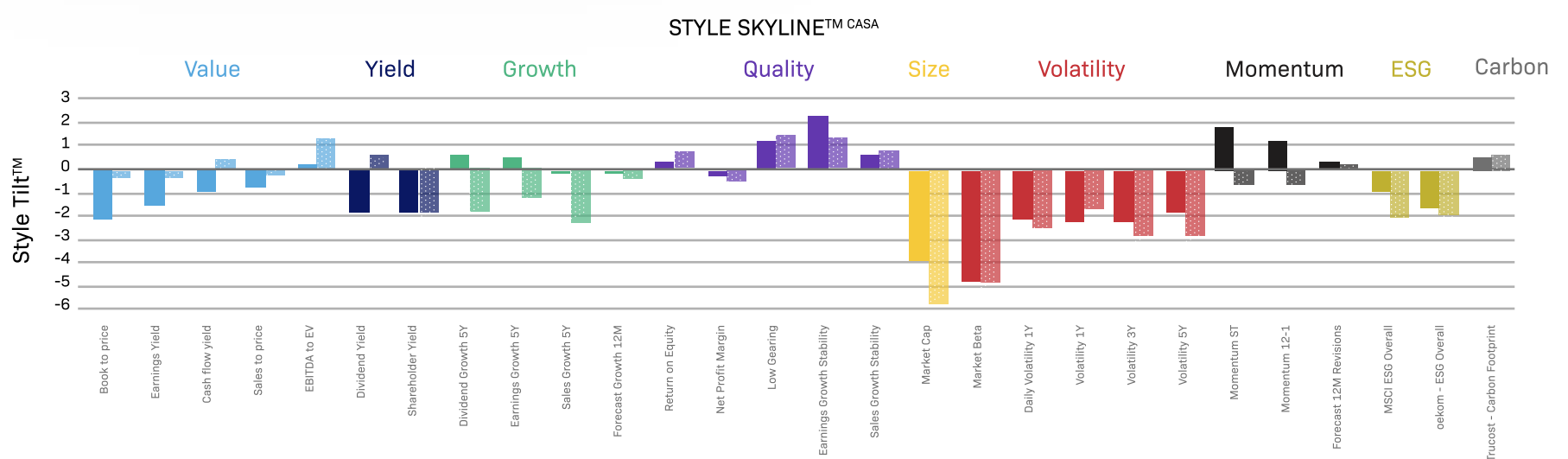
Filter on any combination of metrics including ranges

Sort on any metric, View similarity scores over time

Use the list of similar funds to create a custom Peer Group for further use within Peer Insights™

Export the results into Excel for off-line analysis

Compare your selected fund with any other fund across all your factors of interest



**GLOBAL REACH**  
info@styleanalytics.com

**EMEA**  
T : +44 20 7467 550

**CANADA**  
T : +1 514393 0101

**USA**  
T : +1 617 424 8080

**AUSTRALIA**  
T : +613 9225 5040

**JAPAN**  
T : +81 3 5219 1279

**CHINA**  
T : +86 21 28909032

**FRANCE**  
T : +33 1 73 44 28 97