

NOTHING ELSE LIKE IT

# Similyzer™

## Win and Retain Assets



A comprehensive holdings-based comparison tool for Asset Managers to understand all your competitors instantly and better differentiate your fund. Similyzer™ tells you exactly how similar your fund is to all the other funds in our database of 28,000 global funds.

### Find **each** of your competitors and neutralize them

Surveying the manager landscape just took on a whole new level with our holdings-based Similyzer™ module.

Similyzer™ lets you:

- Find all the funds that are similar to your strategy based on the factors you care about
- See how similar and different your fund is across all factors, ESG, performance and risk measures
- Create a peer-group of your closest competitors to continuously stay ahead of the pack
- Laser-focus analysis of your closest competitors
- Identify non-crowded investment strategies
- Tell a deeper investment story to your clients

### Benefits for Asset Managers

Identify all the funds with factor exposures similar to yours

Quickly find your strongest differentiators against your closest competitors

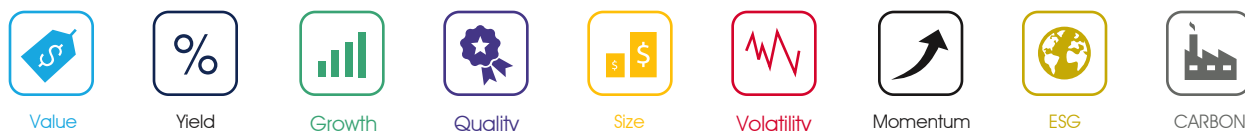
See how crowded your space really is – or isn't

Spot opportunities to be your investors' natural hedge

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

Portfolio	Similarity Style Score	Value	Yield	Growth	Quality	Size	Volatility	Momentum	Performance Return		Risk	
									1 Month	1 Year	Tracking Error	Active Share
<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	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.



GAIN YOUR FACTOR EDGE

### Key Benefits

#### Over 28k Funds

Quickly search for similarities and differences among over 28,000 funds

#### Identify The Funds

Identify each competitor's biggest weakness to your fund.

#### Gain Understanding

Find funds for which your strategy provides a natural hedge

#### Find Funds

Gain a focused understanding of how your fund is similar to, and different from, the competition

#### Filter Funds

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

#### Gain Understanding

Develop a richer and more relevant story for your investors

### Core search / filter capabilities

Similarity measured on any subset of our 130+ factors for all 28,000+ 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

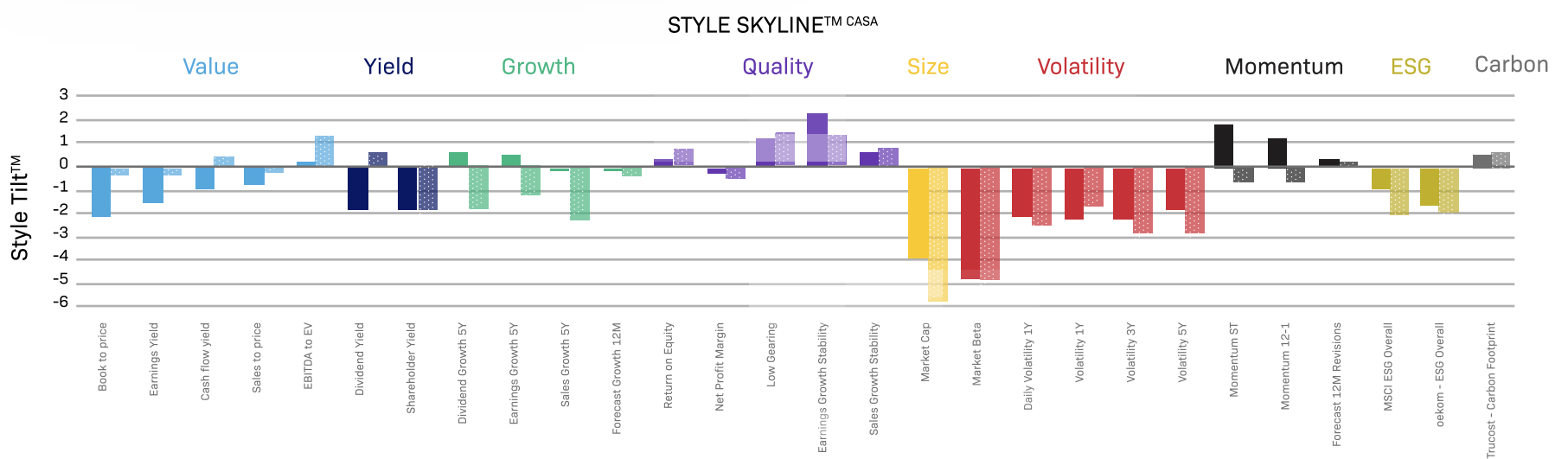
Filter on any combination of metrics including ranges

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

Instantly compare your 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