

## Use factors to gain competitor insights and establish your advantage

Access data on 27,000+ funds\*

Reveal competitor factor exposures

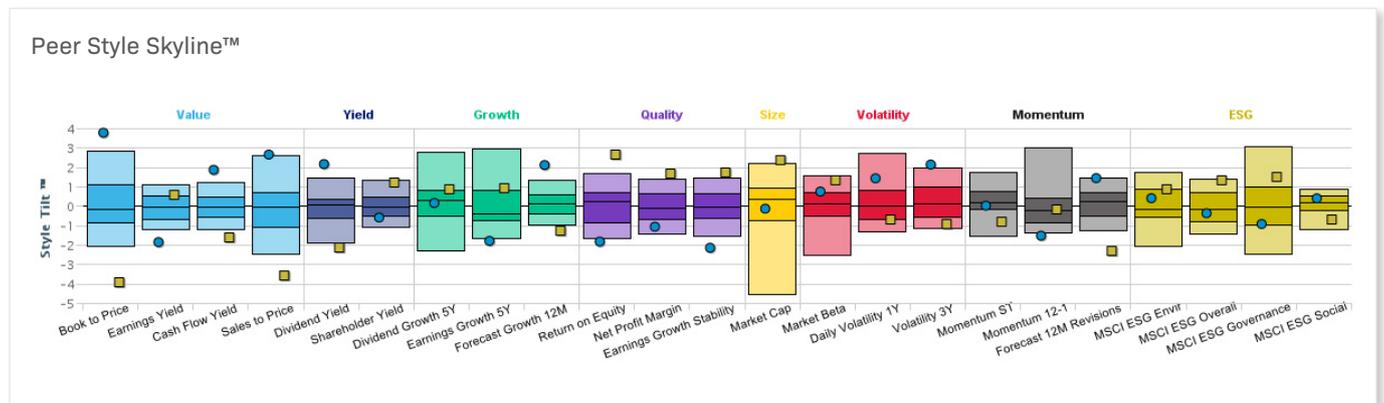
Select and Compare individual funds

Peer Insights™ creates transparency into a universe of competing funds.

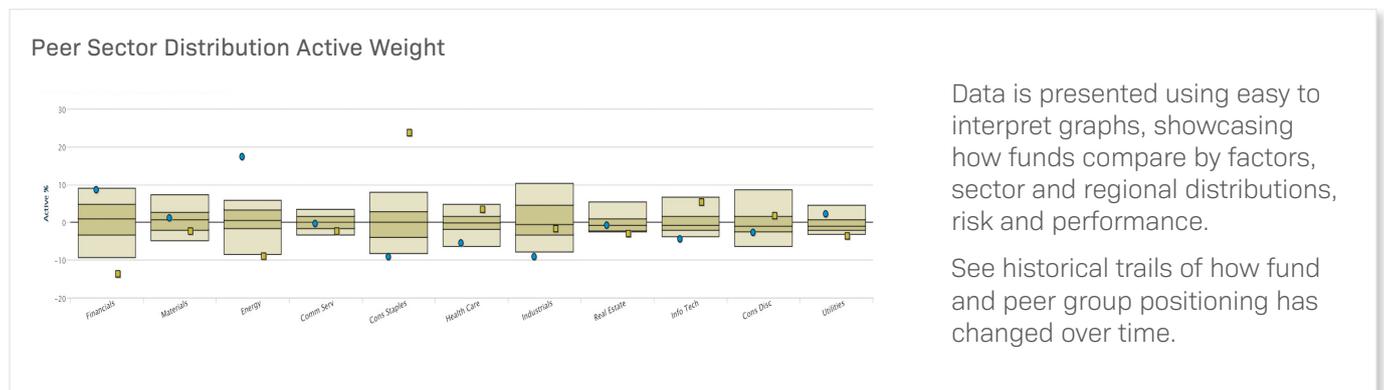
### Asset Managers

- Compare your funds directly to competing funds and the wider peer group, and examine how your factor exposures differ.
- Gain insights on competitors and discover clear differentiating features.
- Identify any meaningful gaps in the peer group and drive product innovation.

### Instantly compare your fund to key competitors and the overall peer group



● Your Fund    ■ Peer Fund A



Data is presented using easy to interpret graphs, showcasing how funds compare by factors, sector and regional distributions, risk and performance.

See historical trails of how fund and peer group positioning has changed over time.

\* Access fund data including: 20,000+ funds from Morningstar, 7,000+ from eVestment, including data on over 1,200 ETFs.

Analyse your competitors like never before. Select a desired fund and reveal the key factors behind a competing investment process.

**Peer Group Portfolio Report**  
UBS ETF FACT MSCI USA QUALITY vs S&P 500 @ 31-MAY-2018

**OVERVIEW**

**STYLE SKYLINE™**

Value Yield Growth Quality Size Volatility Momentum ESG

**REGION DISTRIBUTION**

**SECTOR DISTRIBUTION**

**Book to Price Tilt Details**

Tilt Contributions	Factor Returns	Factor Dispersion
Standard Tilt: -3.47	Factor details	Factor details
Portfolio Wtd Avg: 0.14	Benchmark Wtd Avg: 0.30	Sample Size Adjustment: 0.15
Universe Wtd Std Dev: 0.30		

Top 10	Bottom 10	Tilt Contrib	Factor	Port Wt	BM Wt	Active Wt
AMAZON.COM INC.	MASTERCARD INC.	0.17	0.04	0.00	2.85	-2.85
HOME DEPOT INC.	BERKSHIRE HATHAWAY INC.	0.06	0.01	0.00	0.95	-0.95
BOEING CO.	FACEBOOK INCORPORATION	0.06	0.00	0.00	0.85	-0.85
PHILIP MORRIS INTERNATIONAL INCORPORATIO	FACEBOOK INCORPORATION	0.05	-0.10	0.00	0.54	-0.54
ABBVIE INC.	BANK OF AMERICA CORPORATION	0.04	0.03	0.00	0.69	-0.69
NETFLIX INC.	CITIGROUP INC.	0.04	0.02	0.00	0.66	-0.66
MCDONALD'S CORP.	VISA INCORPORATION	0.04	-0.03	0.00	0.56	-0.56
THE COCA-COLA CO.	JPMORGAN CHASE & CO.	0.03	0.09	0.00	0.72	-0.72
ADOBEE INC.	NVIDIA CORPORATION	0.03	0.07	0.00	0.53	-0.53
LOCKHEED MARTIN CORPORATION	WELLS FARGO & COMPANY	0.02	-0.01	0.00	0.34	-0.34

Once you choose your peer group and begin to compare funds, Peer Insights™ will also provide you with a clear view of any peer fund's top 10 / bottom 10 holdings contributing to an individual factor, sector or country distribution and risk exposure.

Examine portfolios using our Style Skyline and select from 100+ factors from the following style categories



## Global reach

### EMEA

T: +44 20 7467 5500

### Canada

T: +1 514 393 0101

### USA

T: +1 617 424 8080

### Australia

T: +613 9225 5040

### Japan

T: +81 3 5219 1279

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