

Find your perfect fit: use factors to create a short list of managers to fit your criteria

Access data on 27,000+ funds*

Select and compare individual funds

Pick the funds that meet your objectives

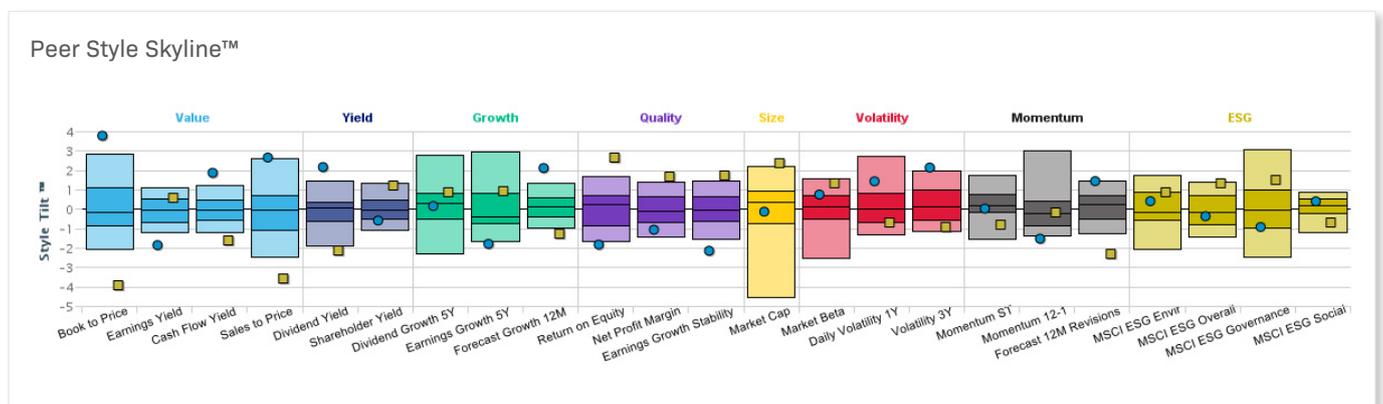
Instantly compare prospective managers

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

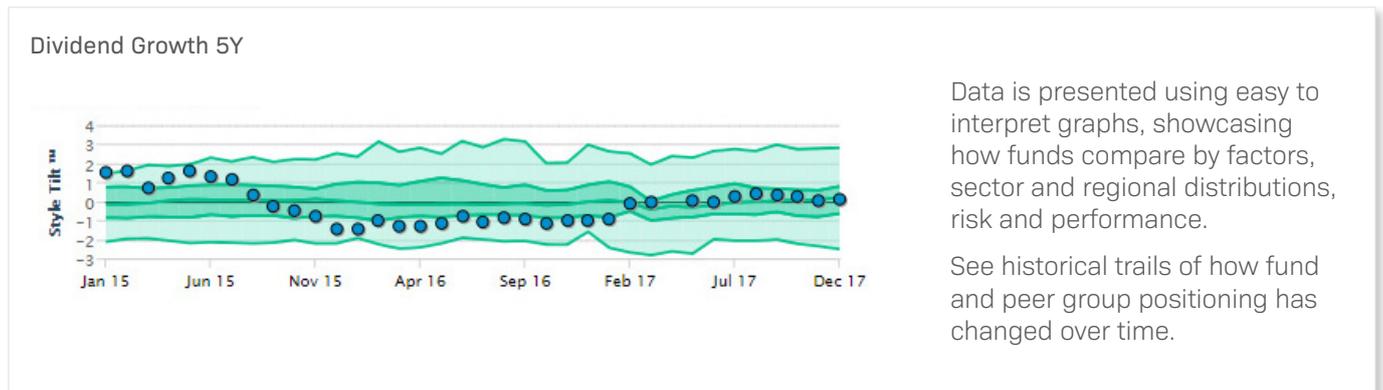
Asset Owners

- Examine peer groups and compare individual managers
- See how your current manager compares to peers and identify style drifts.
- Create the optimal short list of funds for your portfolio, select the criteria you want to see for truly customised comparisons.

Create a customised peer group using intuitive filters: select funds with exposures to your preferred factors.



● 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 managers like never before. Select a desired fund and reveal the key factors behind the 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
Portfolio Wtd Avg:	0.14	Benchmark Wtd Avg:
Universe Wtd Std Dev:	0.30	Sample Size Adjustment:
		0.15

Top 10	Tilt Contrib	Factor	Port Wt	BM Wt	Active Wt
AMAZON.COM INC.	0.17	0.04	0.00	2.85	-2.85
HOME DEPOT INC	0.08	0.01	0.00	0.95	-0.95
BOEING CO	0.06	0.00	0.00	0.85	-0.85
PHILIP MORRIS INTERNATIONAL INCORPORATIO	0.05	-0.10	0.00	0.54	-0.54
ABBVIE INC	0.04	0.03	0.00	0.69	-0.69
NETFLIX INC	0.04	0.02	0.00	0.66	-0.66
MCDONALD'S CORP	0.04	-0.03	0.00	0.56	-0.56
THE COCA-COLA CO	0.03	0.09	0.00	0.72	-0.72
ADOBE INC	0.03	0.07	0.00	0.53	-0.53
LOCKHEED MARTIN CORPORATION	0.02	-0.01	0.00	0.34	-0.34

Bottom 10	Tilt Contrib	Factor	Port Wt	BM Wt	Active Wt
MASTERCARD INC.	-0.18	0.05	3.82	0.76	3.05
BERKSHIRE HATHAWAY INC.	-0.16	0.74	0.00	1.61	-1.61
FACEBOOK INCORPORATION	-0.14	0.11	5.40	2.00	3.40
BANK OF AMERICA CORPORATION	-0.14	0.82	0.00	1.21	-1.21
CITIGROUP INC.	-0.13	1.06	0.00	0.75	-0.75
VISA INCORPORATION	-0.12	0.09	3.58	1.03	2.55
JPMORGAN CHASE & CO.	-0.12	0.63	0.00	1.60	-1.60
NVIDIA CORPORATION	-0.10	0.05	2.47	0.66	1.80
WELLS FARGO & COMPANY	-0.09	0.69	0.00	1.03	-1.03
JOHNSON & JOHNSON	-0.08	0.19	4.82	1.40	3.42

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

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