

Peer Insights™

Measured Differentiation

With so many competing funds, how can you make yourself stand out from the crowd? How do you gain competitor insights and establish your advantage to win and retain assets?

Asset Managers who use our Peer Insights™ to identify and communicate their differentiating value to investors win more business.

Peer Insights™ lets you instantly compare any fund to any peer group of your choice. We've pre-calculated thousands upon thousands of funds' factor tilts – based on their underlying holdings data – giving you an unbiased comparison so you can highlight where you stand out from the crowd.

- Create a truly custom peer group from over 27,000 funds (from our Morningstar and eVestment fund databases) by filtering on any fund characteristic, sub-factor tilt, performance measure or risk metric.
- Get the full picture of your fund compared to your custom peer group with a 360o view of exposure, risk and performance
- See how your fund compares to its peers throughout history for each factor that's important to you and your investors

Key benefits

Demonstrate your investment value

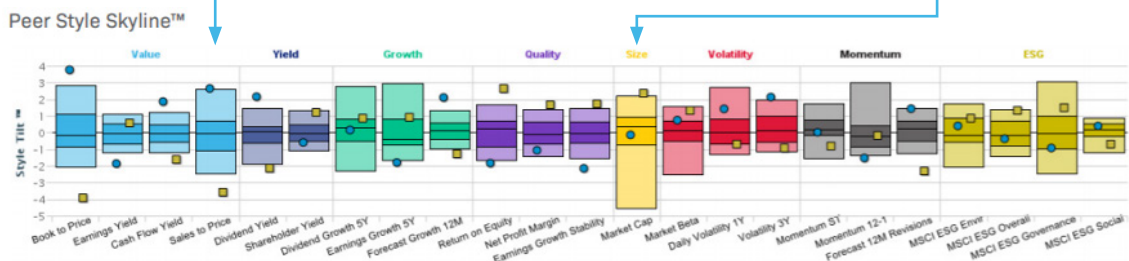
Reveal your differentiating factor exposures

Compare yourself to the fund universe you choose

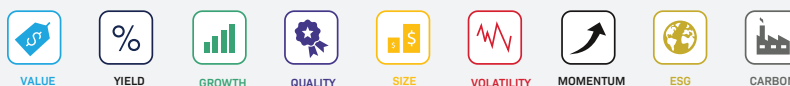
Tailor your story by accessing over 28,000 fundsfund

Your competitor (blue) has virtually the opposite exposure and is an outlier amongst your peers.

Your fund (yellow) has a significant tilt away from Value sub-factors and toward Quality sub-factors much more so than your peers.



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