

Portfolio Analyzer

Confidence in Manager Selection

Asset Owners benefit from analyzing their funds in the same depth as their managers do: sub-factor level exposures, performance attribution and risk.

Getting granular factor analysis for each fund on its own lets the allocator fit the pieces together for better positioning in our dynamic markets.

Portfolio Analyzer is a holdings-based analysis that saves you time, money and effort by clearly and precisely showing the factor profile of each sub fund individually as well as the factor profile of the entire portfolio so you can build exactly the factor exposures you want.

Our Style Skyline™ shows specific factors to understand what is driving a fund's performance. Confirm the investment strategy is on track or pinpoint unintended bets.

- Quickly see a fund's actual factor exposures, and compare to their stated investment style, by using our easy to understand graphics and reports
- Research, select and monitor externally managed funds and track the exposures of internally managed funds

Key benefits

Transparency that give you confidence in manager selection and fund monitoring

Uncover hidden risks

Quickly identify style changes before they become problematic

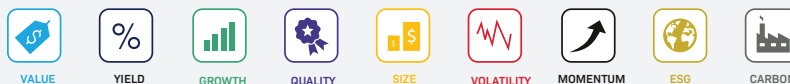
Build trust and communicate clearly with easy to interpret graphics

STYLE SKYLINE™



Drill down to see how an individual factor's tilt values has changed over time, in this example, we examine Volatility 3Y.

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



GAIN YOUR FACTOR EDGE