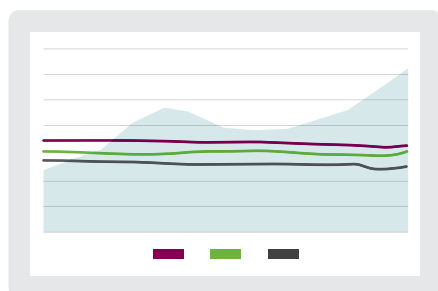


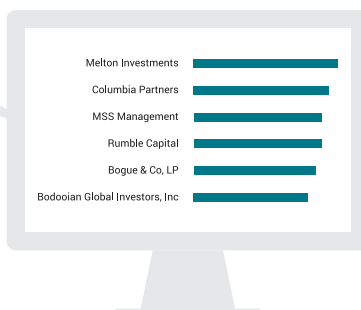
# Know how you stack up with Nasdaq eVestment Advantage

Are your strategies top of mind with gatekeepers? Which firms are you really competing against? Is your consultant outreach effectively building interest in your products? You have hunches about these questions, but Nasdaq eVestment Advantage actually has answers. With data on the products consultants and investors are researching, comparing and charting, you can:

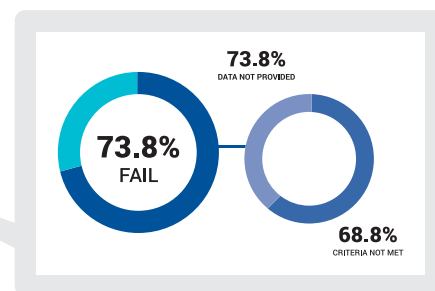
Measure your brand awareness over time



Know who consultants perceive to be your peers and how often you're compared against them



Analyze your screening pass-rate to understand whether you're providing the data consultants want



## Use Advantage To

### Assess where your marketing and consultant relations efforts are working – and where they're not.

Effective roadshows, marketing campaigns and outreach should all increase interest in your strategies, as evidenced by the volume of research consultants conduct on your products. Use screening data in aggregate to gauge awareness of your brand, or track screening activity at the daily or weekly level to assess whether specific sales and marketing tactics are paying off.

### Know who your peers actually are.

Use perceived-peer data in Advantage to understand who consultants and investors regard as your peers, then take a deeper dive into Nasdaq eVestment Analytics to find your competitive edge.

### Fine-tune your pitch decks with the data consultants and investors care about.

Understand the metrics and thresholds consultants and investors use to evaluate products like yours, and incorporate these highly salient data points in your pitch books.

### Geographically locate interest in your strategies.

Identify the regions where interest in your products is growing to align your sales, marketing and consultant relations efforts in those locations.

Gain an advantage with competitive intelligence from Nasdaq eVestment: [nasdaq.com/solutions/evestment](https://nasdaq.com/solutions/evestment)

## Technical Brief

Nasdaq eVestment Advantage provides transparency into how often managers are viewed, screened, charted and analyzed by consultants and institutional investors. This screening or viewership activity is an important early indicator of asset movement in the future, as asset owners and allocators conduct more screens before replacing managers or hiring new ones. At the product level, Advantage provides visibility into not just the number of screens that have included the strategy, but also that strategy's screening pass-rate. Advantage further segments failed screens by reason: For failing to meet criteria or for missing data. The data points consultants and investors use in their screens, along with the value thresholds they set, are also surfaced.

## Capabilities

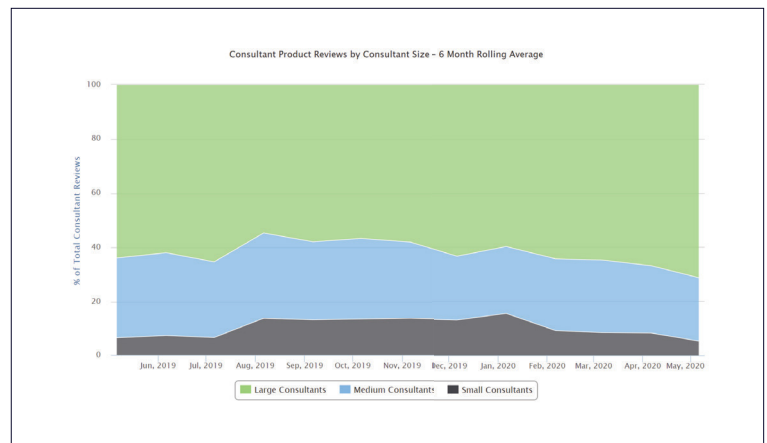
### Product Viewership

See how specific products are being viewed by investors, consultants or both over time. Unique Views surfaces the number of unique analysts and firms that are reviewing the selected product in a given month, as opposed to return viewers.



### Segment Consultant Interest

A breakdown of product views by consultant size helps quantify the level of interest the product is receiving from consultants, without naming specific firms. This helps Consultant Relations and Marketing teams assess whether their outreach efforts are generating greater interest in the product.



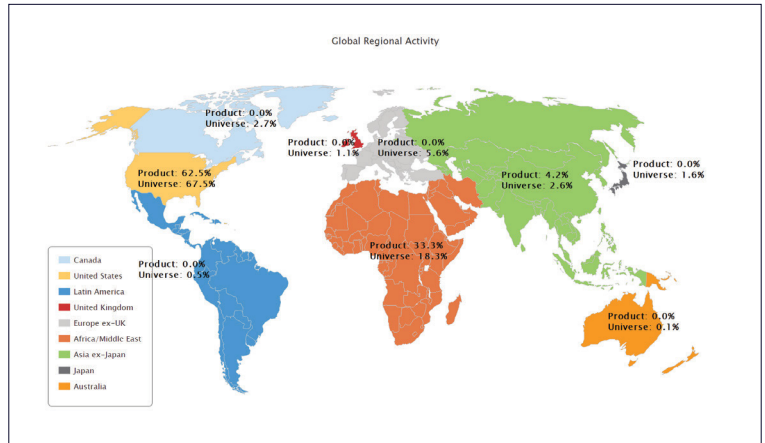
### Products Ranked by Viewership

See how products rank, based on the number of profile views they receive from consultants and investors.

| Percentile Rank Against    | 1 Year | 3 Month | 1 Month |
|----------------------------|--------|---------|---------|
| All Products               | 11     | 54      | ---     |
| US Large Cap Growth Equity | 22     | 67      | ---     |
| All US Equity              | 23     | 65      | ---     |

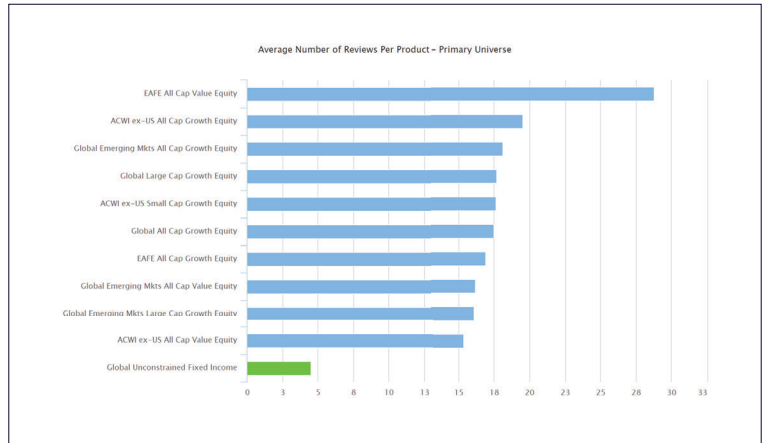
### Viewership by Geography

See the domicile of investors and consultants viewing a selected product and compare to average views for all products in that universe.



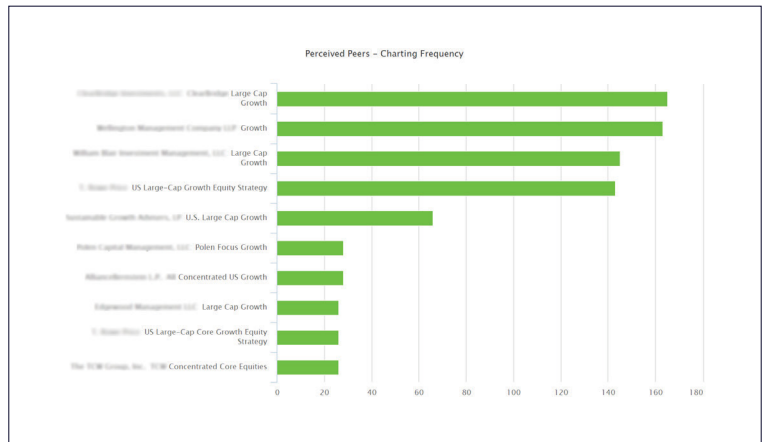
### Trending Products in a Universe

Select a product, then see the top 10 most-viewed products in that product's primary universe. This situates interest in the product relative to the most viewed products. And by tracking the top 10 most-viewed universes, you're seeing early indicators of the strategies consultants and investors are researching now for potential allocation changes in the future.



### Perceived-Peer Groups

When consultants and investors create tables and charts to compare managers, Advantage tracks who is included in those comparisons. This provides clear line-of-sight into which products consultants and investors perceive to be peers.



## Criteria Most Frequently Used to Compare Managers

Advantage tracks the screening criteria and value thresholds consultants and investors use most often to compare managers. Criteria can be very different universe to universe, revealing the metrics and data points asset owners and allocators perceive to be important when they screen managers.

| Screening Criteria |   |       |   |         |
|--------------------|---|-------|---|---------|
| Rank               | Fundamental Large Cap Growth                              | Total | US Large Cap Growth Equity  | Total   |
| 1                  | Performance: Performance: Returns                         | 643   | Performance: Performance: Returns                                   | 444,816 |
| 2                  | Firm: AUM & Accounts: Total AUM                           | 256   | Firm: AUM & Accounts: Total AUM                                     | 120,699 |
| 3                  | Product: Product Profile: Preferred Benchmark             | 246   | Product: AUM & Accounts: Total AUM                                  | 105,615 |
| 4                  | Product: AUM & Accounts: Total AUM                        | 234   | Performance: Returns: MRQ   | 87,821  |
| 5                  | Product: Product Profile: Primary Investment Approach     | 129   | Product: Product Profile: Preferred Benchmark                       | 86,980  |
| 6                  | Performance: Returns: MRQ                                 | 118   | Product: Product Profile: eVestment Product ID                      | 63,826  |
| 7                  | Product: Product Profile: eVestment Product ID            | 115   | Product: Product Profile: Primary Investment Approach               | 53,412  |
| 8                  | Product: Product Profile: Portfolio Management Strategy   | 98    | Product: Product Profile: Portfolio Management Strategy             | 40,507  |
| 9                  | Product: Product Profile: Geographic Region               | 94    | Product: Product Profile: Asset Class                               | 33,590  |
| 10                 | Firm: General Firm Info: Firm Legal Name                  | 91    | Product: Product Profile: Geographic Region                         | 32,073  |
| 11                 | Product: Product Profile: Asset Class                     | 84    | Firm: General Firm Info: Firm Legal Name                            | 31,067  |
| 12                 | Firm: General Firm Info: City                             | 83    | Firm: General Firm Info: eVestment Firm ID                          | 30,952  |
| 13                 | Product: Product Profile: Product Name                    | 82    | Product: Vehicle Availability: Vehicle Category                     | 29,370  |
| 14                 | Product: Vehicle Availability: Vehicle Category           | 66    | Firm: General Firm Info: City                                       | 28,768  |
| 15                 | Performance: Returns: 5 Years                             | 66    | Product: Product Profile: Product Name                              | 28,060  |
| 16                 | Performance: Excess Returns: 3 Years                      | 58    | Performance: Excess Returns: 3 Years                                | 26,920  |
| 17                 | Product: Product Profile: Investment Focus                | 57    | Product: Vehicle Availability: Legal Structure of Vehicle           | 26,396  |
| 18                 | Product: Product Profile: Primary Equity Style Emphasis   | 50    | Product: Product Profile: Primary Equity Style Emphasis             | 23,845  |
| 19                 | Product: Vehicle Availability: Legal Structure of Vehicle | 47    | Performance: Returns: 5 Years                                       | 22,944  |
| 20                 | Performance: Excess Returns: Calendar Year                | 47    | Product: Product Profile: Is this product a dedicated ESG strategy? | 21,199  |

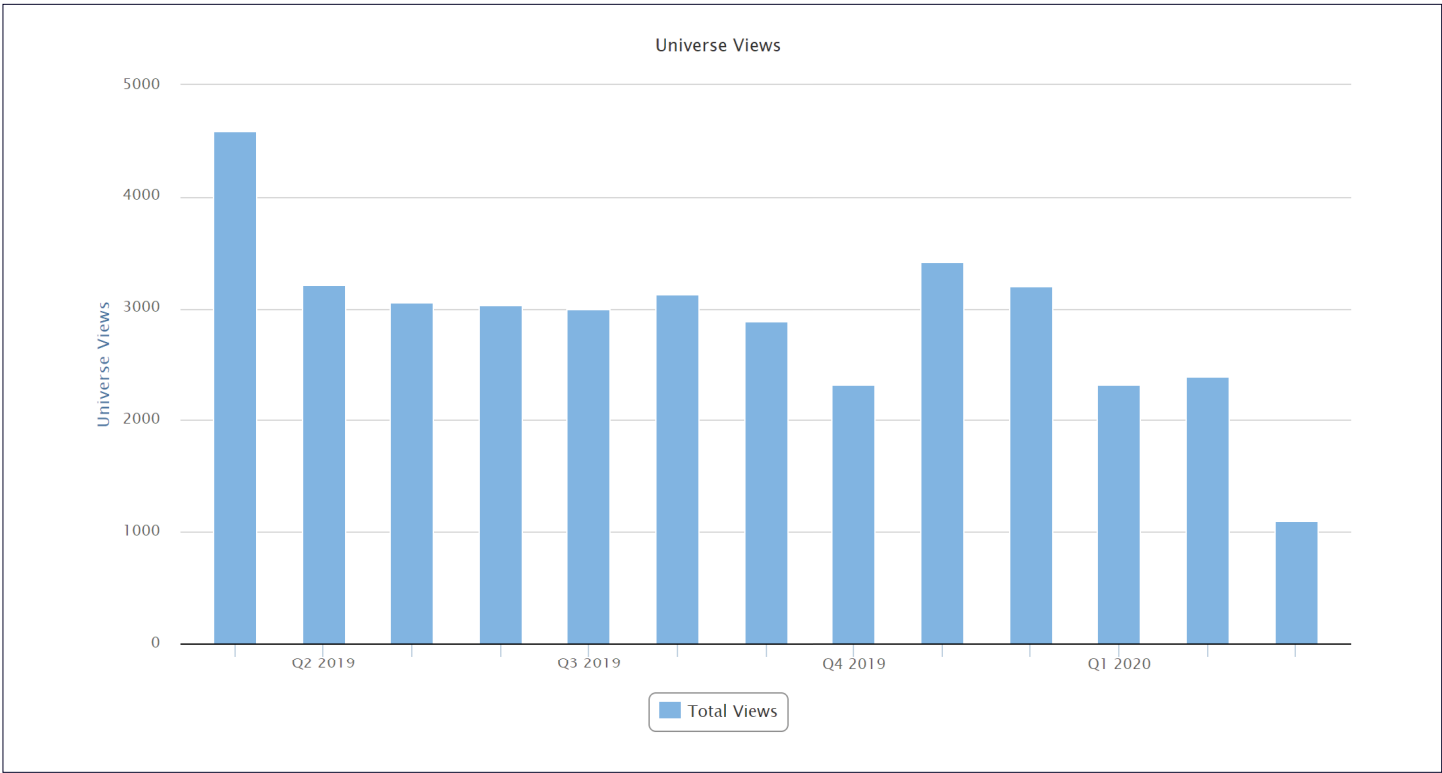
## Universe Level Intelligence

With viewership data updated daily, track and analyze views on 715 universes across multiple time periods to understand which ones are gaining or losing momentum.

Filter universe views by regional location, type of client or show only the universes with your firm's products to gain a customized look of each universe you compete in.

Drill into any universe to see the total views, median product views and the top-viewed products in that universe, along with total viewership numbers, returns, and stated fees all ranked and exportable to Excel.

| Universe (347)                           | Universe Views ⓘ |                | Products |
|--|------------------|----------------|----------|
|  | Total ↓          | Median Product |          |
| US Large Cap Value Equity                | 12,431           | 12             | 424      |
| Global Large Cap Core Equity             | 11,286           | 15             | 302      |
| Global All Cap Core Equity               | 11,202           | 14             | 320      |
| US Large Cap Growth Equity               | 10,792           | 12             | 335      |
| US Small Cap Value Equity                | 9,112            | 20             | 258      |
| Global All Cap Growth Equity             | 8,923            | 24             | 113      |
| Global Emerging Mkts All Cap Core Equity | 8,593            | 31             | 180      |
| US Large Cap Core Equity                 | 8,578            | 12             | 418      |
| US High Yield Fixed Income               | 7,849            | 14             | 272      |
| US Small Cap Growth Equity               | 6,831            | 22             | 190      |
| US Core Fixed Income                     | 6,557            | 11             | 264      |
| US Small Cap Core Equity                 | 6,452            | 13             | 213      |
| Global All Cap Value Equity              | 5,591            | 19             | 127      |



#### Top-Viewed Products in the Universe

| Firm Name                                  | Product Name                  | Views |      | 3-Year Returns (Q1 2020) |      | 1-Year Trailing Flows (Q1 2020) |      | \$50M Stated Fees |      |
|--|-------------------------------|-------|------|--------------------------|------|---------------------------------|------|-------------------|------|
|  |                               | Total | Rank | Total                    | Rank | Total ↑                         | Rank | Total             | Rank |
| Investment Capital Management, LLC         | Equity                        | 1243  | 1    | 2.35%                    | 13   | ---                             | ---  | 60                | 70   |
| High Capital Management, LLC               | Equity                        | 1184  | 1    | 3.97%                    | 6    | ---                             | ---  | 78                | 94   |
| Bridge 6, LLC                              | Bridge 6, U.S. Equity         | 1169  | 1    | -1.91%                   | 57   | ---                             | ---  | 50                | 29   |
| Investment Capital Partners, LLC           | Large Cap                     | 753   | 1    | 2.23%                    | 15   | ---                             | ---  | 72                | 90   |
| IC Asset Management                        | Large Cap Value Equity (U.S.) | 746   | 1    | -4.84%                   | 85   | ---                             | ---  | 55                | 51   |
| IC Partners, LLC                           | Relative Value Equity         | 577   | 1    | 3.83%                    | 6    | ---                             | ---  | 55                | 51   |
| Service, Health, Healthcare & Biotech, LLC | Large Cap Value Equity        | 562   | 1    | -2.38%                   | 65   | ---                             | ---  | 42                | 17   |
| IC, LP                                     | Large Cap - Absolute Value    | 504   | 1    | -4.34%                   | 83   | ---                             | ---  | 30                | 3    |

To request a tour of Advantage, visit [nasdaq.com/solutions/evestment](https://nasdaq.com/solutions/evestment)

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