



Skill Screening



Portfolio
Analysis



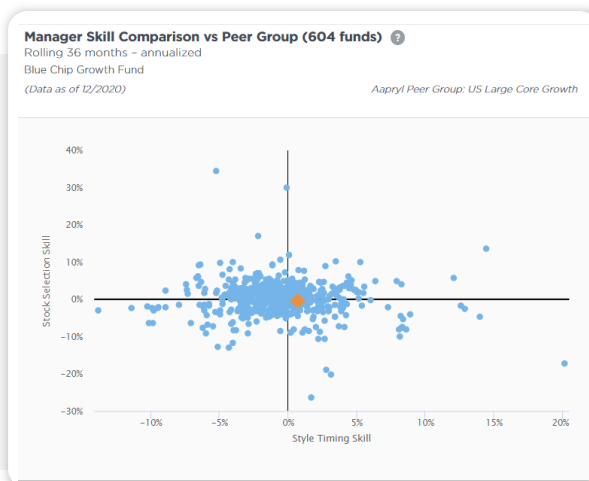
Style
Analysis



Skill
Analysis

- » Integrated platform for deeper due diligence on mutual funds, SMAs and ETFs.
- » Back up your recommendations with data and charts.

- Identify managers most likely to outperform their peer groups over the next 3 years.
- Distinguish a manager's skill and luck to help make better recommendations

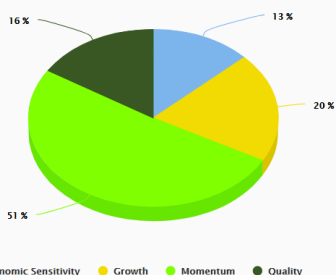


Factor Composition of Manager Product ?

Blue Chip Growth Fund
(Data as of 12/2020)

☒ Static (full history) ☐ Dynamic (most recent 36 months)

☐ Distinct ☒ Factor ☐ Cap Size ☐ Region



- ♦ Learn the market factors driving a manager's performance.
- ♦ Be aware of unintended bets and exposures.

- » Understand risk and alpha. Create portfolios that are optimized on manager skill.
- » Look holistically at your recommended lists and models.

