



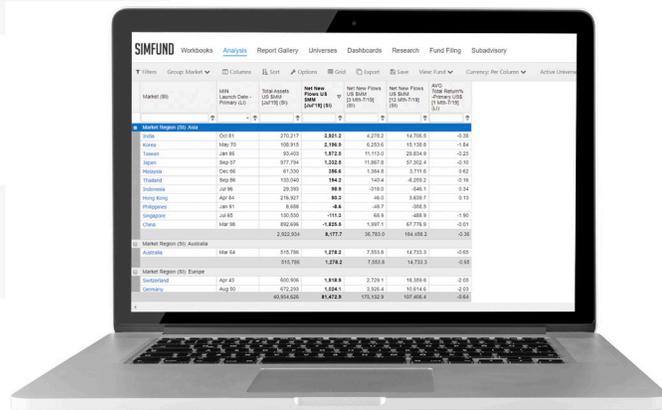
## Global Solutions

The solution of choice for leading asset managers and thought leaders for 20+ years

Simfund Global is the premier, cloud-based platform integrating the industry's best-in-breed proprietary and third-party datasets for advanced business intelligence across every major fund market. With defined applications for executives to analysts, Simfund streamlines information dissemination and collaboration across the product life-cycle and organization.

## The Power of Simfund Global

Covering 90K funds across 50 fund domiciles representing \$44T in AUM, Simfund Global provides the most comprehensive view of domestic and cross-border mutual funds and ETFs globally. Benefit from fully integrated datasets that leverage proprietary, consortium-based and best-in-breed data sources. Equipped with a powerful engine built for flexible ad-hoc analysis, shareable reports to facilitate collaboration, dynamic and customisable dashboards, print-ready competitor factsheets, and automated email alerts, Simfund Global delivers critically important information to the hands of those closest to the business when they need it.



# How Simfund Will Help You



## Strategy & Finance

- ▶ Identify and evaluate business opportunities
- ▶ Assess business risks and threats
- ▶ Make resource deployment decisions



## Marketing & Distribution

- ▶ Identify suitable product types across key regions and countries of growth
- ▶ Monitor monthly asset and flow rankings, market share and rank across key business segments and identify new markets and competitive advantages



## Product Development

- ▶ Analyse local and cross-border trends to monitor and measure the competitiveness of your respective fund range. Identify new opportunities for product innovation and quickly assess pockets of potential growth and penetration
- ▶ Create monthly reporting to keep a pulse on product innovation across key countries and categories for relevant peers groups
- ▶ Facilitate strategic product life cycle management globally with flexible analytics



## Competitive Intelligence

- ▶ Analyse firm and fund competitiveness by leveraging key proprietary and third-party product attributes such as fees, ratings and performance from Morningstar, Lipper and Fitz Partners
- ▶ Monitor global market share for mutual funds and ETFs across 50 countries
- ▶ Analyse your firms' key product attributes against consortium peers with granular fund benchmarking within consortium-based, cross-border segments

### ABOUT ISS

Founded in 1985, the Institutional Shareholder Services group of companies ("ISS") empowers investors and companies to build for long-term and sustainable growth by providing high-quality data, analytics, and insight. Comprised of seven discrete business lines, ISS is today the world's leading provider of corporate governance and responsible investment solutions, market intelligence and fund services, and events and editorial content for institutional investors and corporations, globally.

ISS Market Intelligence (MI) division provides critical data and insight to global asset managers, insurance companies and distributors to help them make informed, strategic decisions to manage and grow their business. Through its industry-leading combination of proprietary and integrated datasets, in-depth global research and reliable executive engagement, ISS MI delivers solutions for market sizing, competitor benchmarking, product strategy and opportunity identification across a wide range of financial products including funds, annuities, insurance, mortgages, and other instruments. The ISS MI group includes the industry-leading data platforms Simfund, BrightScope, Local Market Share, and Financial Clarity, as well as a full collection of global research and analytic services including 529 & ABLE Solutions, Board Services, Investor Economics, Market Metrics, and Plan For Life.

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