

MARKETPLACE

Broadridge MarketPlace enhances your knowledge of the companies and professionals driving the investment management industry. It is an essential resource to help you succeed in an increasingly competitive and unpredictable environment. MarketPlace provides information and analytics to help you define market opportunities, qualify prospects and access competitive intelligence needed to win new clients and grow existing business.

ACCESS UNPARALLELED CONTENT

Plan Sponsors

- Over 18,000 sponsors with assets of at least \$10 million, including corporate funds, endowments and foundations, multi-employer, hospital, and public funds.

Investment Managers and their Products

- Over 1,300 investment firms and
- 20,000 mutual fund and separate accounts products with quarterly and monthly net and gross rates of return.

Pension Fund Consultants

- Over 200 firms and their pension and endowment clients

LEVERAGE POWERFUL FUNCTIONALITY

MarketPlace offers advanced search and sorting capabilities and reporting options.

- Quickly locate the information you need, identify prospects, and determine relationships among managers, sponsors, and consultants.
- Sort your search results by firm, product, assets or location.
- Print profile information
- Download your results

- Export your lists to Excel and incorporate the information into your own spreadsheets.

MARKETPLACE ANALYTICS

(Separately Managed Accounts – SMAs)

Conduct in-depth cash flow analyses and identify industry trends.

Quickly identify

- Managers with highest cash flows and assets
- Market share of your competitors' products
- Assets at risk
- Net flow quartiles
- Managers' asset allocation
- Net flows by asset class, product type, investment style, investment firm, product, and capitalization emphasis

Access Ready to use Reports

- Track institutional trends and individual investment managers' activities
- Build a targeting and risk model based on the most popular separate accounts by net flows, performance or assets
- Identify best performing investments

Additional Functionalities

- Specialize your search and create your own peer groups
- Export results in easy to use format
- Customize analysis for net flows and assets