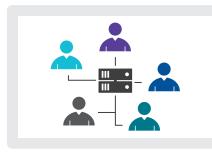


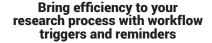
Scale your research with

RESEARCH MANAGEMENT

Intensive manager research is central to what you do. Ensure that your research – from documents and notes to commentary and reviews -- are centralized and secure with eVestment Research Management.

Centralize your firm's manager research assets







Document your due-diligence methodology for your board or other stakeholders



USE RESEARCH MANAGEMENT TO

Centralize your manager research assets.

Findability sounds like a tech term, but it's actually a problem many research teams face everyday. They know they have deep research on a strategy or manager, but it's just not findable. It's hidden on a chaotic shared drive or dispersed across analysts.

Bring efficiency to your research process.

Your research team has a well defined due-diligence process for screening managers, but you're still relying on emails to remind people of review deadlines or pending approvals. Automated workflow frees you to do what you do best — research, analyze and think — and lets technology take care of reminders to Kevin.

Educate clients and stakeholders.

Increasingly, boards, families and other investor stakeholders want to more fully understand the process behind how particular managers have been chosen. With a purpose-built platform for manager research, it's easy to show your due-diligence process, step by step.

Step-up to Investor Pro because your tools should be as good as you are.

Research Management +

- The most influential database of institutional managers in the world
- Analytics tools for comparing and ranking managers and conducting what-if simulations
- A searchable document library with intelligence on the fees other investors are paying, consultant recommendations and thousands of manager ratings by other investors and consultants

Request a tour:

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Technical Brief

eVestment Research Management is the only purpose-built research management platform designed for institutional manager research. Other RMS platforms are designed for investment research with the expensive functionality required to track individual securities, but eVestment Research Management is specifically designed for public pensions, corporate plans, endowments, foundations, family offices and other organizations that research money managers. Our RMS also integrates with eVestment data on 23,000+ institutional strategies from 3,400+ long-only and hedge fund managers worldwide.

Capabilities

Centralized Manager Research & Intelligence

Project and document libraries ensure all your information is in one place. Just drag-and-drop files to upload them to a library and link email correspondence with Outlook integration.

Approved		Overview
RATEGY	21 ASSESSMENTS by As of Date	+ 1 STRATEGIES by Name
Seography I US Market Cap Micro Cap eVRM Fields	I. Idea Generation - employs a multi-manager approach to managing Microcap equities. The firm focuse_ I. Implementation - employs an aggressive search for new managers to invest with. The firm's approach - Portfolio Construction - sapproach to portfolio construction results in a portfolio that is balanced to m.	werange Confidence Small Cap Value Subadvisor High Confidence High Confidence High Confidence
	Subsides management - Moltermanager approach rocused of memolencialeas with high retains for active ma	No Rank
🖢 Analytics Profile 🔗 🔗	Manager Recommendation PA 2021, Sep 02	werage Confidence
Microcap Equity	A Manager Recommendation 🕅 2020, Sep 02	werage Confidence
	Anager Recommendation PA 2020, Sep 01	High Confidence
IRQ YTD 1 Yr 3 Yrs 5 Yrs 7 Yrs 10 Yrs	15 DOCUMENTS by Name	+ 1 COMPANIES by Name
	Internal Analysis - Packet 6 Versions	PA 2020, Feb 18
strategy uses a multi-manager approach focus	d Internal Analysis - Quant Profile 32 Versions	PA 2020, Mar 26 4 Strategies, 7 Employees Parent Compa
n domestic microcap equities. generally considers U.S. icrocap to include those companies below \$1 billion in market cap a	d Internal Analysis - RFP 2 Versions	PA 2019, May 15
eks to remain invested down the cap spectrum to take greatest Ivantage of market inefficiencies. The product utilizes the Russell	Marketing - Factsheet 71 Versions	PA 2020, Apr 23
icrocap Index as its benchmark.	Marketing - GIPS Performance 2 Versions	PA 2019, Apr 25
Created 2019, Jan 08	Marketing - Pitch Deck 1 Version	2019, Feb 04
	39 NOTES by As of Date	+ 5 PEOPLE by Last Name
		PA 2019, Feb 14
	Research Note Conference Call	PA 2019, Feb 14 Primary Lead Analyst
	Performance Update Performance Update	
	ADV Review Mentioned Conference Call	
4 978 4	DD Checklist	PA 2019, Jan 25 Analyst
Monitoring Rules Research Activity Due Diligence Checklists	Research Note	PA 2019, Jan 17
Checklists	Meeting Minutes Investment Committee Mentioned Conference Call	PA 2019, Jan 17 Analyst 🖌

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Compliance Governance

eVestment RMS makes it easy for teams to adhere to compliance guidelines – every time. Ensure your disclosures are up-to-date and reports match your brand guidelines, with automated compliance monitoring, a due diligence calendar and packet builder.

RESEARC	H RESOURCES	DASHBOARD							
ACTIVITY AND NOTES MONITORING RULES CHECKLISTS									
5 Templates		7 Entities		APPROVED MANAGER					
By Age	• •				By A	ge 🔹	□ Φ		8
0	Pre-commitmer 0% - 0 of 3 items of		Yesterday 10:28 am			Emerging Markets All Cap Equitie 25% - 1 of 4 items complete			
0	Approved Mana 17% - 2 of 12 item			Apr, 9	Φ	Microcap Eq 25% - 1 of 4 items comp			
0	Private Fund OD 0% - 0 of 4 items of			Mar, 25	Φ	0% - 0 of 4 items comple	rte		
0	Key Person Dep 0% - 0 of 9 items of			Mar, 19					
0	Manager Onboa 0% - 0 of 4 items of			Mar, 6					

	118 CALENDAR by Status				
LY PERFORMANCE UPDATE Quarterly 114 D MANAGER ONSITE Rolling 12 Months 21		Last Interaction Performance Update PA 2020, Apr 23		Next Interaction 2020, Se	
NUMBER OF ANNUAL DOD Annually 12 Months 116 ADV REVIEW Rolling 12 Months 117 NTEREST FOLLOW UP Rolling 12 Months 5	Adama Total Stands Spally Fand 10 History Total Factory	Last Interaction Performance Update PA 2020, Mar 25		Next Interaction 2020, Jun	
	Aufline Real Assastic LLP	Last Interaction Perf Update 🛤 2020, Mar 26		Next Interaction 2020, Ju	
	Ballio Officed. Dramping Markets 40 Day Equilies. Social Office CA. (2)	Last Interaction perf update q1 2020 DE 2020, Apr 9		Next Interaction 2020, Se	
	MRCNee Need Division 40 Gap Table New York Need Division 40 Cap Table			Next Interaction 2020, Ju	
	Mandates 1.2 Private Spally V Hardines Asset Harappenet	Last Interaction Performance Update PA 2019, May 22		Next Interaction 2020, Ju	
	Access Daplet Community Insectment 1011 - Date: Access House House	Last Interaction Q3 Update PA 2019, June 6		Next Interaction 2020, Ju	
	Author Real Assets (LL)			Next Interaction 2020, Ju	
	Aufter Real Assets (6.1.7			Next Interaction 2020, Ju	
	Aufter Real Assets ICL R	Last Interaction Update PA 2019, Jan 24		Next Interaction 2020, Ju	
	Name Quarterly Perfor	mance Update Frequency Quarterly Applicable Status Approved	Applicable Ranks	N 11	
	Asset Classes Rule Satisifed by Performance Up	ndate			

Track Activity

View and monitor the status of research and review activities across your firm. Instantly see your firm's approved manager list and manage your research pipeline using customized asset classes and factors. Automated tracking ensures you're able to document the firm's opinions and recommendations over time for better internal analysis and communication with stakeholders or clients.

EARCH RESOURCES DASHBOARD			Filter & Search
TIVITY AND NOTES MONITORING RULES CHECKLISTS			
ALL ACTIVITY		510 STRATEGY CHANGES	
updated the Catchup for the week note in the icrocap Equity strategy	12:24 pm	Emerging Markets All Cap Equities 💽 2020, Apr 09	High Confidence
updated the Performance Update note in the merging Markets All Cap Equifies strategy	12:24 pm	Emerging Markets All Cap Equities 💽 2020, Apr 09	In Progress + Mew
updated the Portfolio Update note in the scrocap boulty strategy	12.24 pm	Emerging Markets All Cap Equities 💽 2020, Apr 09	Approved
updated the Performance Update note in the nerging Markets All Cop Equities strategy		Microcop Equity 🔝 2020, Apr 00	Pending Review + Approved
updated the RE Mar 20 Results note in the	do teles brans	Microcap Equity 🔝 2020, Apr 03	Interest -> Pending Review
updated the Onsite note in the	12:23 pm	Microcap Equity 🔝 2020, Apr 03	Accoroved > Interest
updated the Catchup for the week note in the	12:23 pm	Microcop Equity 🔁 2020. Apr 03	toy - Day
icrocap Equity strategy	12:23 pm	359 RECENT NOTES	
removed the Asset Managers Confront Video Conferencing	Security Risks note in rategy	Performance Update Microcap Equity Performance Update Ad of 2020, Apr 23	🔯 2020, Apr 23
removed the Research Note note in the lococap Equity strategy	[7] 12:23 pm	Onsite Microcap Equity On-ste Meeting As of 2020, Apr 23	🔟 12:23 pm
updated the Research Note note in the strategy	a management of	Research Note Conference Cell As of 2020; Apr 17	🕎 12.23 pm
removed the Approved Manager checklist in the	12:23 pm	Catchup for the week	🕎 12:24 pm
removed the Sample Final note in the	12:22 pm	Performance Update Reformance Update As of 2020, Apr 09	12:24 pm
Icrocap Equity strategy	12:21 pm	RE: Mar 20	🕎 12:23 pm
crocap Equity strategy	12:21 pm	Pertfelio Update	12:24 pm

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Capture Interactions

Use quick notes on your laptop or mobile device to capture meeting notes, attendees and documents related to the interaction. These artifacts are all searchable so you can find them quickly later.

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X G B B A A G B J B S X X II II II II II B B B B B Fanal - A B-	Research Note			
Leven beam is simply dummy test of the printing and typesetting industry. Loven (peum has been the industry's standard dummy test ever since the 1508s, when as unknown printer took a galley of type and	Save Into			
scrambled Ets make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially anchanged. It was popularised in the 1980s with the release of Lettrast shoets containing Lower forum parages, and more recently with desireo publishing software like Aldus PageMaker including ventions of Lorent Ipaum.	Strategy in			
 Lorem (pum is simply durinity lost of the printing and typewelting industry. Lorem (pum is seen the industry's standard durinity tool war since the 1500s, when an unknown printer took a galley of type and screetbield it to make a type spectrum book. It has survived not only the centuries, but site the least into electronic toesetting, remaining essentially unchanged. It was oppositered in the 	Type As of Dat			
type and southout to make a get occurrent book. It has survived not only trie company, but ison the way for the second optimistry understandy understand by the second optimistry and the second optimis	Conference Call	019		
 Lower (pourn is simply during text of the printing and typesetting industry Lower (pourn has been the industry) standard during text even since the 1500s, when an unknown printer text is galley of https and screenbed it to make a tape spectree book. It has survived not only the centuries, but also the electronic topesetting, remaining espectrally unsharped. It was popularised in the 	Attendees			
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	Also Mentioned			
	Investment Opennities ×			
	5 LINKED FILES			
	Note Attachment - Created 2019, Jun 21 by Pat Adran	(and a second		
	Note Attachment - DesignLab Core Dreated 2019, Jun 21 by Pat Adrian	Fixed income.pdf		
	Note Attachment - Design.ab Small Cap Deated 2019, Jun 21 by Pat Adrian	Eoulypdf		
	Marketing - GIPS Performance - eVectment - He Dreated 2015, Apr 25 by Pat Advisor	sge Fund Report (Global Macro) .		
	Marketing - Factsheet	nd-Fact-Sheet-302018-FINAL.p		
	Created 2019, Feb 27	Edited 2019, J		

Linked to eVestment data on 23,000+ strategies

Link managers to their eVestment profiles to always have the latest reported data on performance, risk, portfolio characteristics and more.

RESEARCH RESOURCES DASHBOARD			PA Filter & Search	Q
MICROCAP EQUITY Approved				Expanded View
STRATEGY 🖉	ANALYTICS PROFILE			P
DETAILS	Andre besternte		ASSET CLASS	
ACTIVITY			Equity	
ANALYTICS PROFILE	MICROCAP EQUITY			
RELATED RESOURCES	As of Mar, 31			
21 ASSESSMENTS				
15 DOCUMENTS	GEOGRAPHY United States	TOTAL PRODUCT AUM \$467.7MM (-41.28%)	PREFERRED BENCHMARK Russell Microcap	
38 NOTES	PRIMARY CAPITALIZATION	PRODUCT INSTITUTIONAL AUM	PRIMARY UNIVERSE	
LINKED RESOURCES	Micro Cap	\$467.7MM (-41.28%)	eA US Micro Cap Core Equity	
0 STRATEGIES	PRIMARY EQUITY STYLE	TOTAL FIRM AUM	DEFAULT VEHICLE	
1 COMPANIES	Core	\$504.3MM (-40.33%)		
5 PEOPLE				
RESEARCH TRACKING	Key Product Updates			
3 MONITORING RULES	As of Mar, 31			
4 DUE DILIGENCE CHECKLISTS	Microcap Equity is	underperforming the Russell Microcap with a -0.86% 3-year excess return,	, falling into the 3rd quartile of the US Micro Cap Core Equity with a percentile	e rank of 62.
3RD PARTY PLATFORMS				
EVRMFIELDS	T⊥ Institutional AUM has decreased by 41.28% to	\$468M since the past quarter.		
	Vehicle			
	Separate/Segregated Account in Microcap Ec	uity		Active ×
	Annualized Returns As of Mar, 31		Universe Rankings As of Mar, 31	
	Percentile MRQ YTD	1 Yr 3 Yrs 5 Yrs 7 Yrs 10 Yrs	MRQ YTD 1 Yr 3 Yrs 5 Yrs	7 Yrs 10 Yrs
+ QUICK CREATE + REPORT AN ISSUE				RESEARCH MANAGEMENT