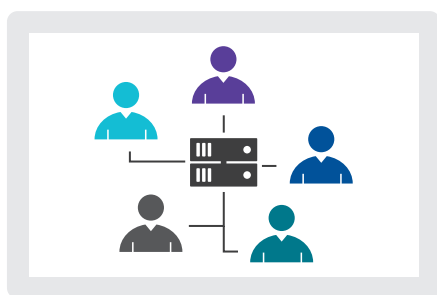


# Scale your research with

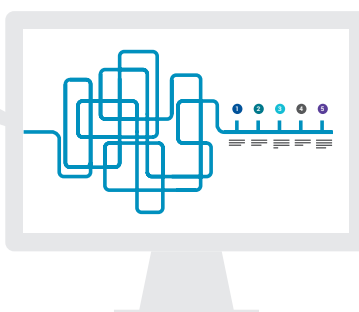
## RESEARCH MANAGEMENT

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**



**Bring efficiency to your  
research process with workflow  
triggers and reminders**



**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:**

**[solutions@evestment.com](mailto:solutions@evestment.com)**

# The power of RESEARCH MANAGEMENT

## 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.

The screenshot displays the eVestment Research Management dashboard, which is organized into several key sections:

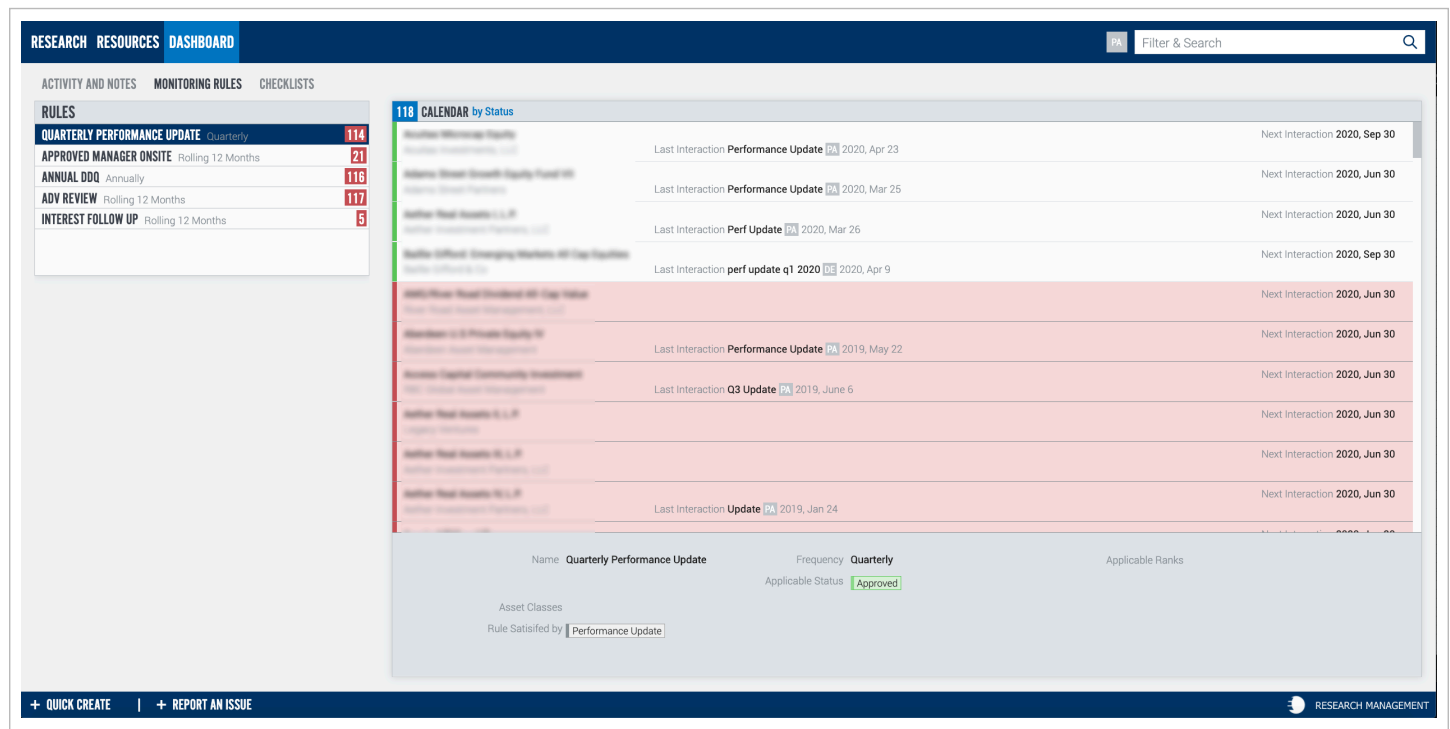
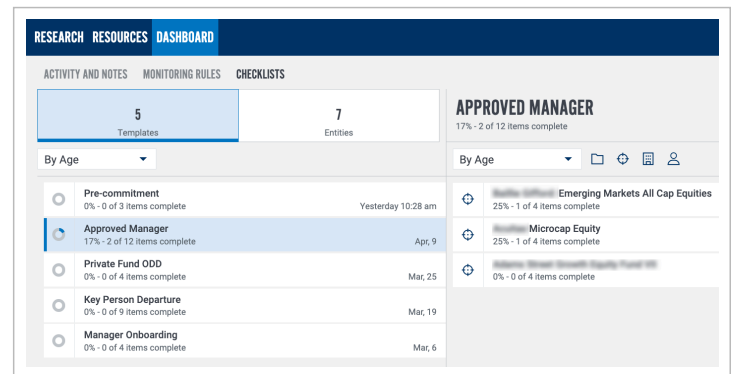
- RESEARCH RESOURCES DASHBOARD**: The top navigation bar includes a search filter and a search icon.
- STRATEGY**: A section on the left showing a strategy profile for "eVRM Fields" with an "Analytics Profile" and a "Microcap Equity" focus. It includes a timeline from MRQ to 10 Yrs.
- ASSESSMENTS by As of Date**: A central section displaying a list of assessments, including "Manager Recommendation" and "Internal Analysis", with associated dates and confidence levels (e.g., "Average Confidence", "High Confidence").
- DOCUMENTS by Name**: A section below assessments listing various documents such as "Internal Analysis - Packet 6 Versions", "Internal Analysis - Quant Profile 32 Versions", and "Marketing - Factsheet 71 Versions".
- NOTES by As of Date**: A section at the bottom left listing notes like "On-site Review", "Research Note", and "Performance Update", with dates and status indicators (e.g., "On-site Meeting", "Conference Call").
- STRATEGIES by Name**: A section on the right showing a list of strategies, including "Small Cap Value".
- COMPANIES by Name**: A section below strategies showing a list of companies, including "4 Strategies, 7 Employees".
- PEOPLE by Last Name**: A section at the bottom right showing a list of people, including "Primary Lead Analyst", "Director of Research", and "Analyst".

The dashboard also features a bottom navigation bar with "QUICK CREATE" and "REPORT AN ISSUE" buttons, and a "RESEARCH MANAGEMENT" logo.

The power of  
**RESEARCH MANAGEMENT**

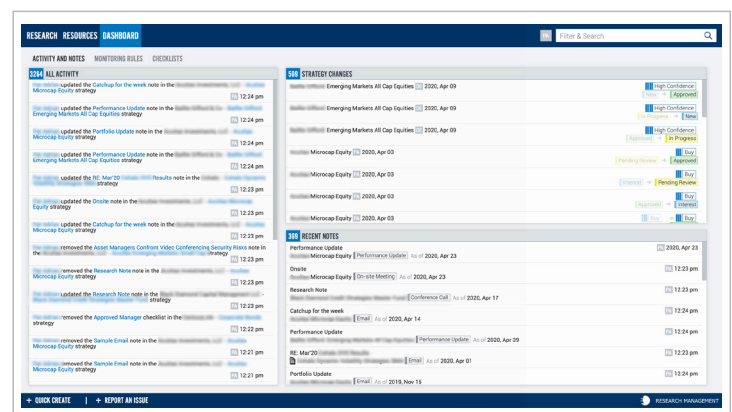
## Compliance Governance

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.



## Track Activity

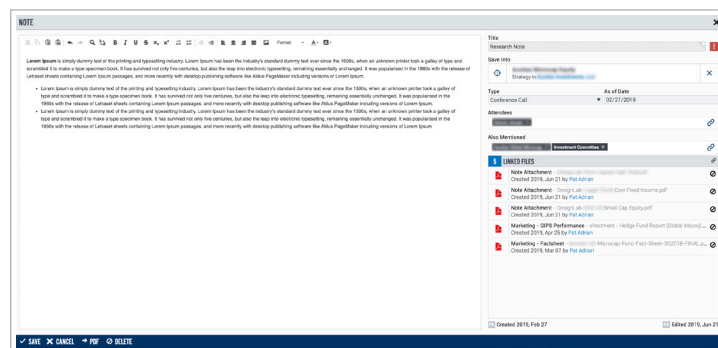
View and monitor the status of research and review activities across your firm. Instantly see your firm's approved manager list and manage your research pipeline using customized asset classes and factors. Automated tracking ensures you're able to document the firm's opinions and recommendations over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



# The power of RESEARCH MANAGEMENT

## 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.



## 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.

ANALYTICS PROFILE	
MICROCAP EQUITY	
As of Mar, 31	
GEOGRAPHY United States	TOTAL PRODUCT AUM \$467.7MM (-41.28%)
PRIMARY CAPITALIZATION Micro Cap	PRODUCT INSTITUTIONAL AUM \$467.7MM (-41.28%)
PRIMARY EQUITY STYLE Core	TOTAL FIRM AUM \$504.3MM (-40.33%)

**Key Product Updates**  
As of Mar, 31

- 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 rank of 62.
- Institutional AUM has decreased by 41.28% to \$468M since the past quarter.

**Vehicle**

Microcap Composite  
Separate/Segregated Account in Microcap Equity

**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	