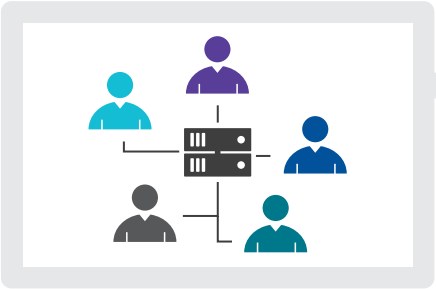
EVESTMENT
A Part of Nasdaq

Scale your research with

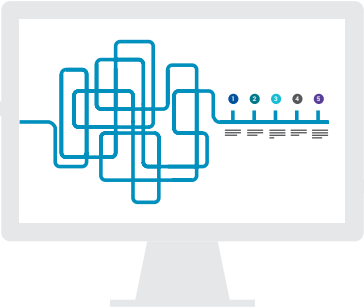
RESEARCH MANAGEMENT

Your intellectual capital is your greatest differentiator. Secure, store and track your research team's IP to ensure it's fully leveraged across your firm with eVestment Research Management.

Centralize your firm's manager research assets



Bring efficiency to your research process with workflow triggers and reminders



Have your research history compliance-ready with a trackable, auditable workflow

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.

Meet compliance requirements.
With a platform expressly designed by former consultants for manager research, your documents, notes, reviews and workflows are always compliance-ready, in a centralized place.

Store, organize and track your manager research:

solutions@evestment.com

The power of

RESEARCH MANAGEMENT

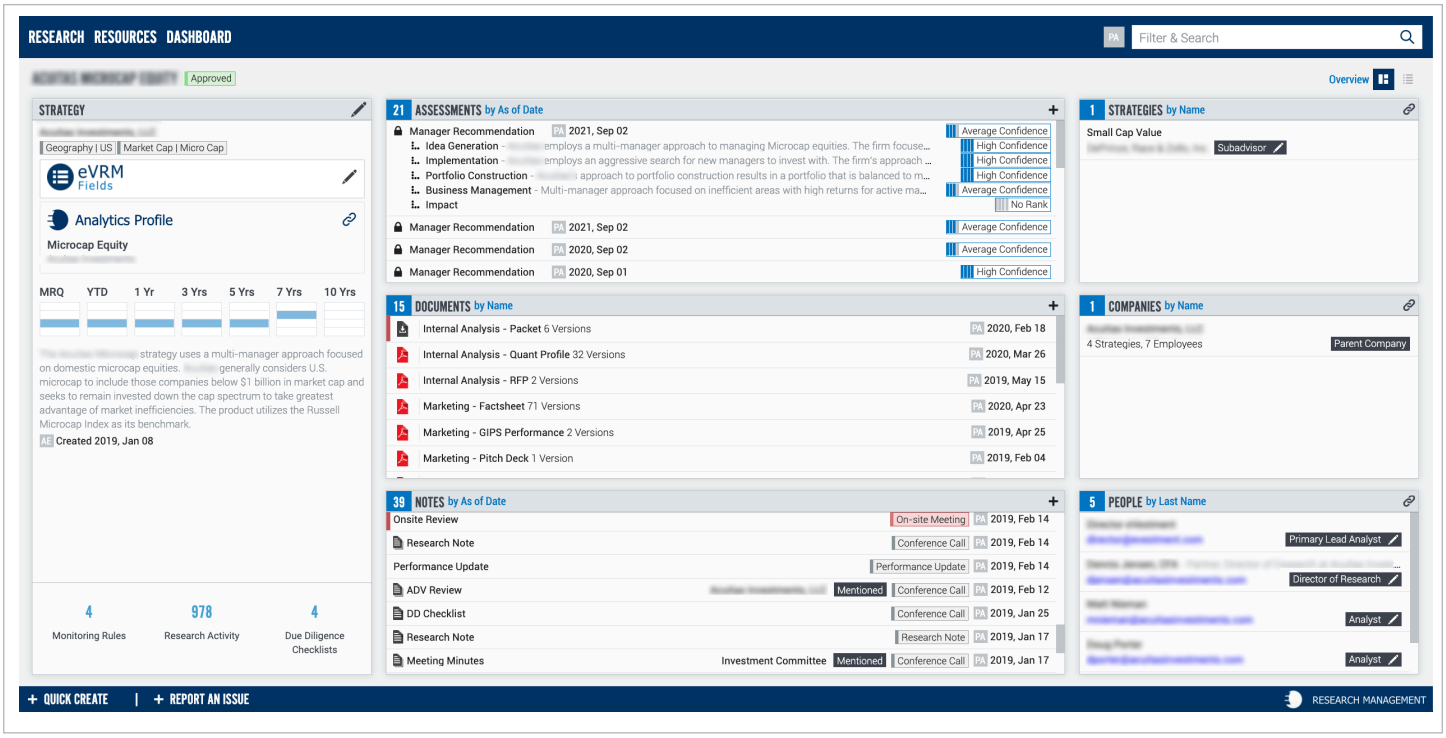
Technical Brief

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 research consultants working with institutional clients. Our RMS also integrates with eVestment data on 25,000+ institutional strategies from 3,300+ long-only and hedge fund managers.

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.

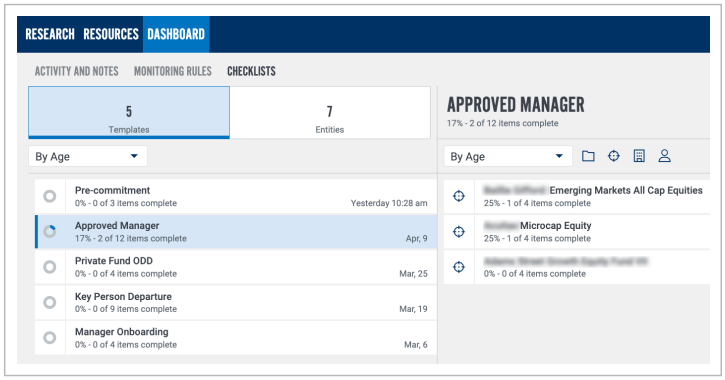


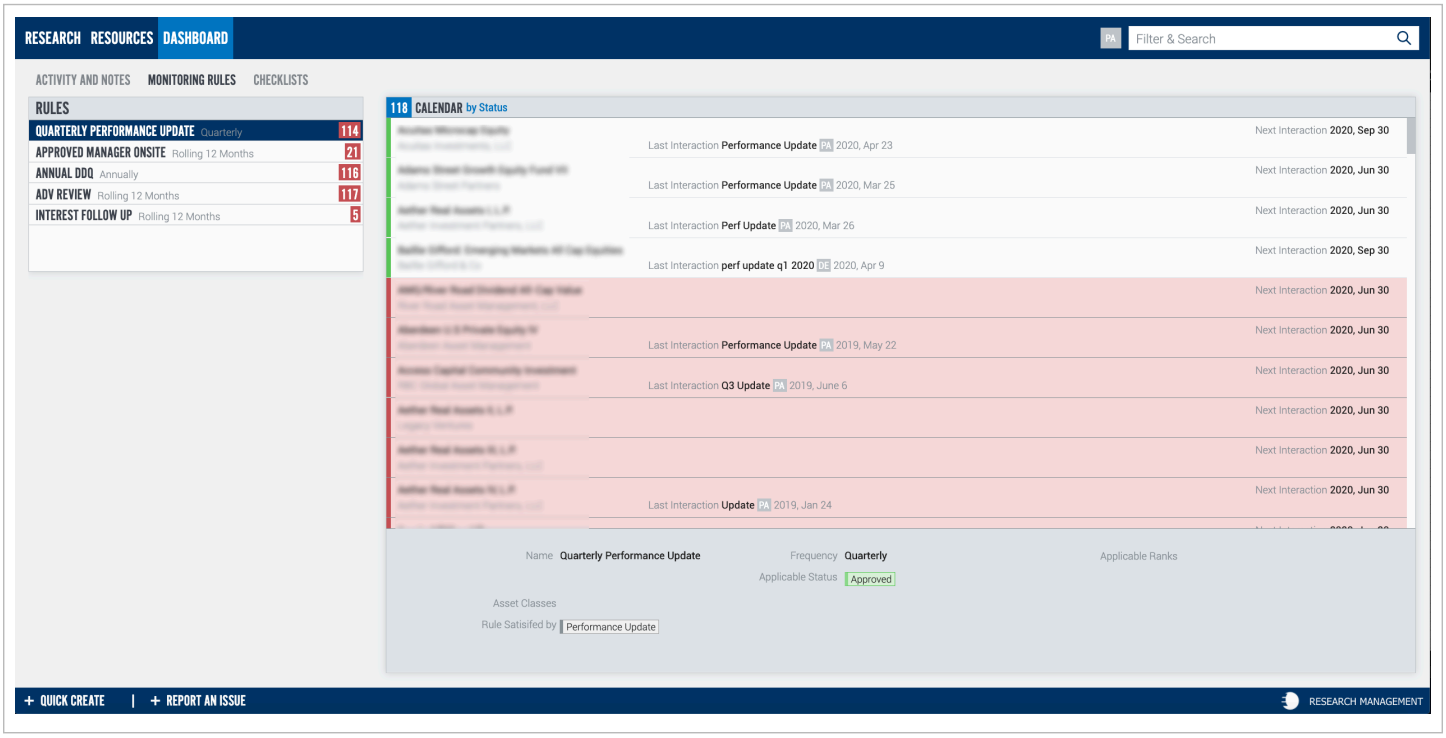
The power of

RESEARCH MANAGEMENT

Compliance Governance

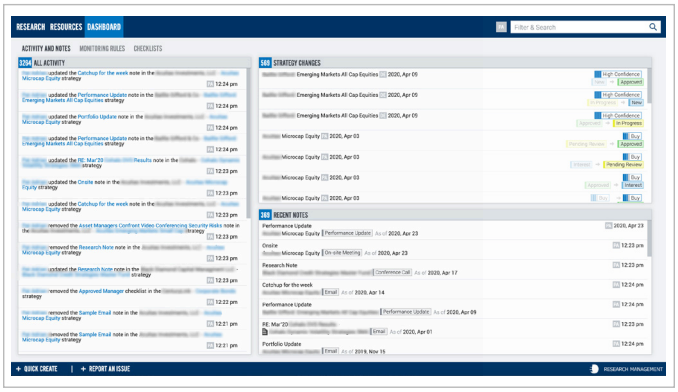
eVestment RMS makes it easy for teams to adhere to compliance guidelines – every time. Ensure your disclosures are up-to-date and reports match your brand guidelines, with automated compliance monitoring, a due diligence calendar and packet builder.





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 clients or compliance.



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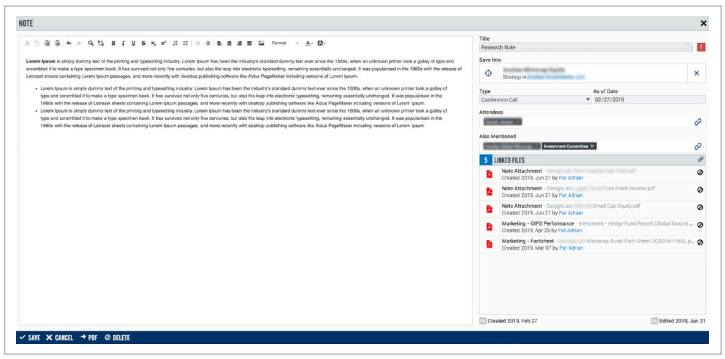
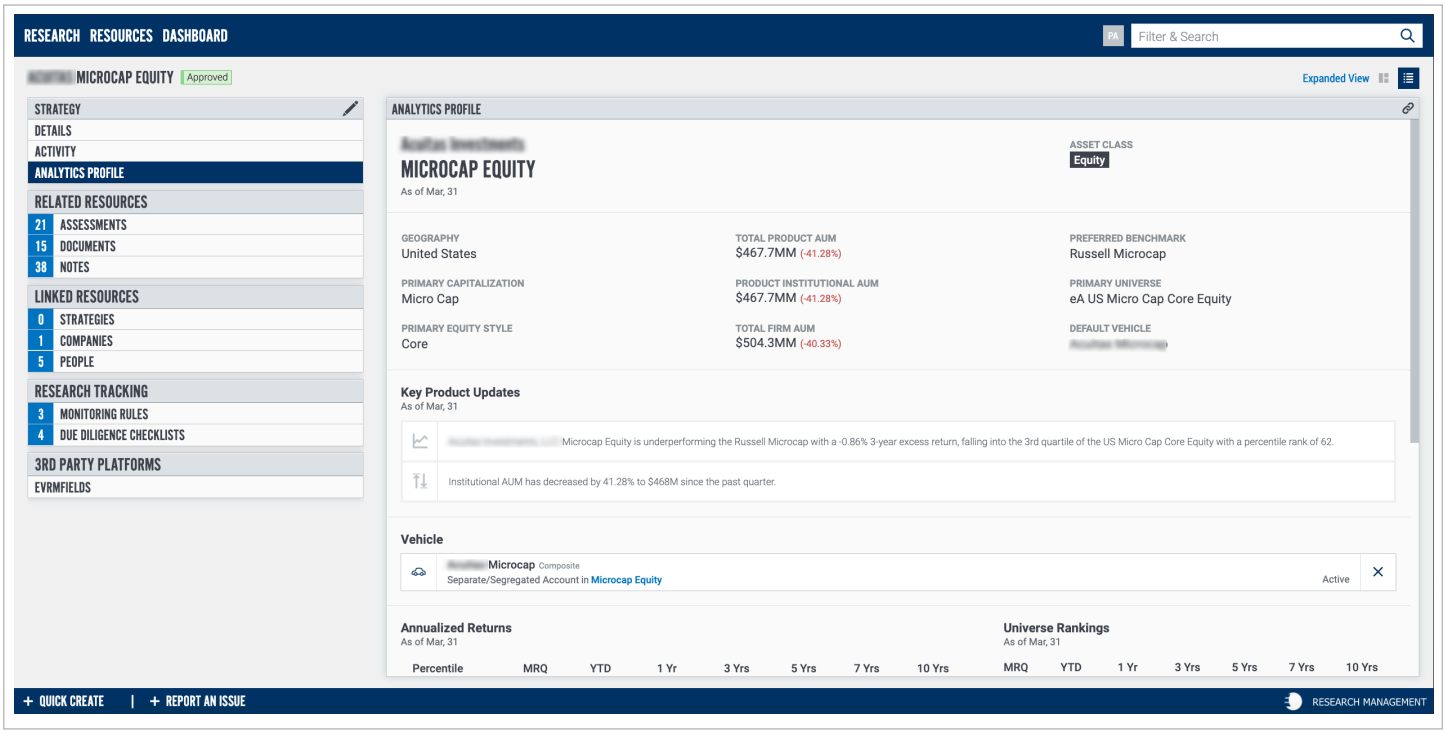
Capture Interactions

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.



Linked to eVestment data on 26,000+ strategies

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



To request a tour of **Research Management,** contact **solutions@evestment.com.**