Distribution Intelligence. **Smart at Scale.**

Leveraging eVestment data across platforms through API technology

IN BRIEF

Most Distribution leaders have succeeded in building ecosystems of best-in-class data sources for competitive intelligence, but they're finding more data isn't necessarily translating into better results. As data platforms multiply, so do formatting and reporting inconsistencies, making it harder than ever to establish a standardized, accurate and timely view of the competitive landscape. This is why tech-forward executives in Distribution are transforming how teams work with intelligence at scale through API technology.

RESULT: MORE MANDATES, NEW ASSETS

Scaling distribution intelligence isn't only an operational efficiency. It's a competitive imperative that leads to new assets by transforming how your team works with:

A complete picture of the consultants & investors to target for business development

Today's challenge: Prospecting intelligence is scattered across platforms and difficult to piece together manually. Your outreach history with each prospect is siloed from intelligence on potential replacements or new searches.

Transformed: Consultant and investor intelligence from eVestment is integrated into your CRM so everything you know about your prospects, and your history with them, is centralized and consolidated.
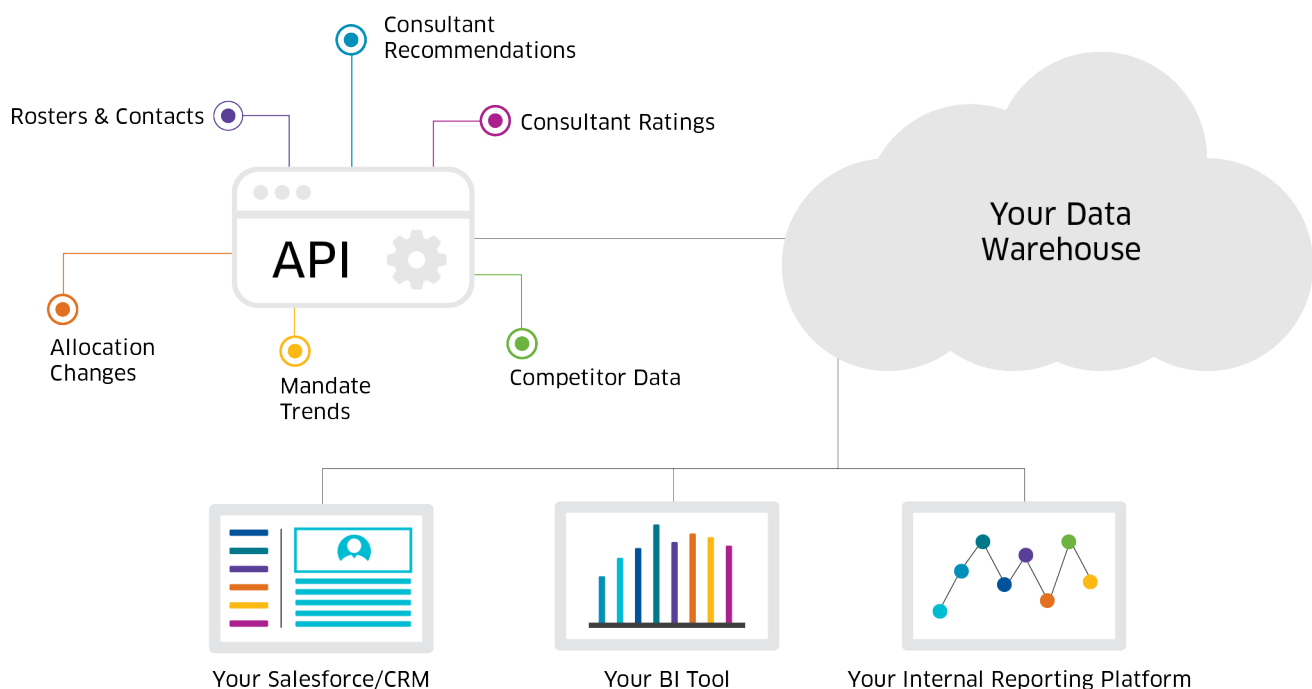
Intelligence that's automatically surfaced to your team for action

Today's challenge: Data has to be mined by someone who knows what's available, how to extract it and how to remove the noise to expose the actionable intelligence.
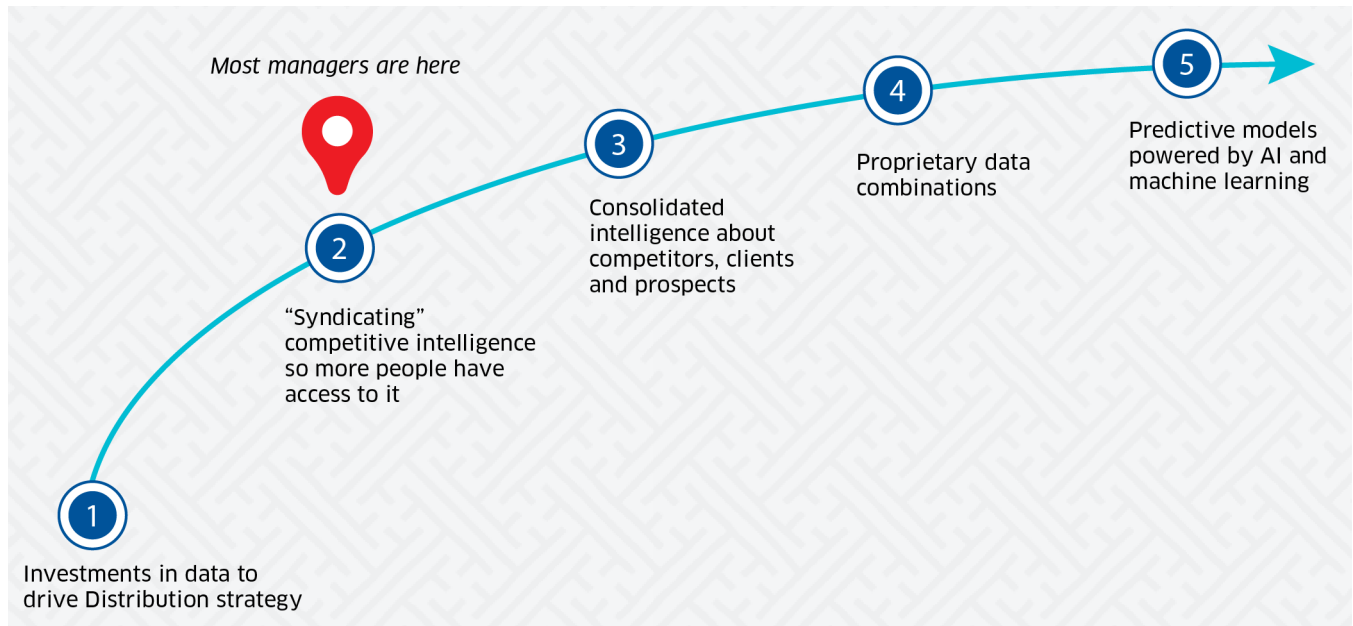
Transformed: Easy-to-consume dashboards that surface actionable insights right in the workspace your team uses every day.

LEVERAGING EVESTMENT DATA IN YOUR PLATFORMS

Consultant Recommendations

Rosters & Contacts

Consultant Ratings

API

Your Data Warehouse

Allocation Changes

Mandate Trends

Competitor Data

Your Salesforce/CRM

Your BI Tool

Your Internal Reporting Platform

THE DATA MATURITY CURVE

Most managers are here

1 Investments in data to drive Distribution strategy

2 "Syndicating" competitive intelligence so more people have access to it

3 Consolidated intelligence about competitors, clients and prospects

4 Proprietary data combinations

5 Predictive models powered by AI and machine learning

Most Distribution leaders already drive strategy with meaningful investments in data to identify trends in the institutional market, track competitors and monitor the landscape for leading indicators of new opportunities or redemption risks. For many firms, though, this data is not well syndicated throughout Distribution. It resides in standalone platforms and is often pulled by analysts who may not see signals in the data that seasoned Directors or Client Portfolio Managers would.

The Distribution Intelligence API provides the connectivity needed to fully leverage your data investment and capitalize on your competitive advantages at scale.

COMPETITIVE INTELLIGENCE

Syndicating

The first logical step for most managers is to maximize their data investments by pushing aggregated intelligence automatically to the people who need it and can act on it. When competitive intelligence is pushed to the surface rather than passively stored, it really becomes actionable – not just in theory, but in practice.

Consolidating

Stitching together competitive intelligence from different sources can be onerous – so much so that too often it doesn't get done. Client, prospect and competitor notes and tasks reside in the CRM, while competitive intelligence on those same firms sits in eVestment. The most forward-thinking managers we work with see the integration of these two business-critical data sources as essential to their Distribution playbook.

Combining

Managers with mature data science teams typically want to develop proprietary algorithms that combine data from multiple sources in novel ways. eVestment intelligence pushed to their data warehouse is an important part of that equation. From there, it can be synthesized with any other data residing in your warehouse, such as financials.

Predicting

The cutting edge of the data maturity curve is AI and machine learning acting on combined intelligence for forecasting and predictive modeling. These models may include such data sets as historical performance for competitors or longitudinal trends in mandate participation by asset class.

GETTING STARTED

Most managers take a phased approach to their data-integration strategy, with a priority on surfacing actionable intelligence on potential mandates, vulnerable competitors, consultant ratings and key contacts. Once the API is implemented, most also discover new ways of integrating eVestment intelligence with other data sources, such as financials, to produce proprietary insights.

The most successful implementations focus first on pushing actionable insights to front-office teams so they know:

- Where new and replacement opportunities are taking shape
- Who to contact for prospecting
- When competitors are vulnerable – because of performance, outflows or downgrades

Once this quick time-to-value is achieved, managers then develop a roadmap for deeper data integrations.

DATA INCLUDED IN THE APIs

Rosters & Contacts
- Consultant client rosters
- Investor manager rosters
- Key contacts at consultants and investors

Unannounced Potential Mandates
- Terminate/replace/reduce/watchlist recommendations from consultants
- Allocation change recommendations from consultants

Consultants Ratings
- Sortable by consultant, manager, asset class, universe or consultant sentiment

Mandate Trends
- Mandates by asset class, universe or date
- Participating managers: Winners, finalists, those being replaced

Competitor Data
- Performance, including historical
- Assets and accounts
- Alerts of significant changes in tagged competitors' AUM or performance

ABOUT OUR APIs:
FOR YOUR DATA TEAM

RESTful architecture accessible by HTTPS, R, Python or Excel

A variety of output formats, including JSON, XML and CSV

Sorting and filtering support customization

It uses TLS 1.3 security for maximum data safety and integrity

Power BI integration uses templates and requires only the support of a Microsoft Administrator – implementation usually takes less than a day

Whether you're a large global manager or a small emerging hedge fund, eVestment has helped firms just like yours scale distribution intelligence through API technology.

**Request a consultation:
solutions@evestment.com**